

FEDERAL
ACQUISITION
INSTITUTE



Registrar Task Aids

*To foster a high-performing,
qualified civilian acquisition
workforce.*



<https://www.fai.gov/>



FAI@mail.mil

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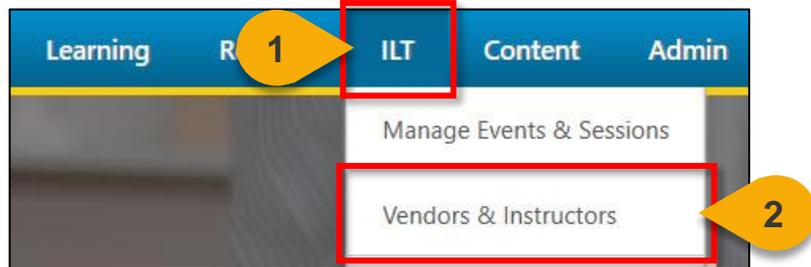
Instructors & Facilities



View Instructors for Your Schoolhouse

When you want to view available Instructors...

Steps 1 & 2: Hover over the **ILT** tab, then select **Vendors & Instructors**.



Step 3: Click on the **Instructors** link to the right of the Vendor or Training Provider for which you wish to view Instructors.

A screenshot of a 'Vendors' table. The table has columns: VENDOR NAME, CONTACT NAME, PHONE, ACTIVE, EDIT, and INSTRUCTORS. The 'Instructors' link for the 'Federal - Instructor-Led (ILT)' vendor is highlighted with a red box and a yellow callout '3'. The table also includes navigation links: « Previous 1-9 of 9 Next ».

VENDOR NAME	CONTACT NAME	PHONE	ACTIVE	EDIT	INSTRUCTORS
Federal - DOE Acquisition Learning Center			Yes		Instructors
Federal - DOT			Yes		Instructors
Federal - EPA			Yes		Instructors
Federal - GSA Acquisition Institute			Yes		Instructors
Federal - HHS Acquisition Institute			Yes		Instructors
Federal - Homeland Security Acquisition Institute (HSAI)			Yes		Instructors
Federal - Instructor-Led (ILT)			Yes		Instructors
Federal - USAID PDT - Center for Continuous Learning			Yes		Instructors
Federal - VA Acquisition Academy (VAAA)			Yes		Instructors

Step 4: You will then be directed to the **Instructors** page. From here, you can take action to **view their schedule**, **inactivate the Instructor**, or **edit their information**.

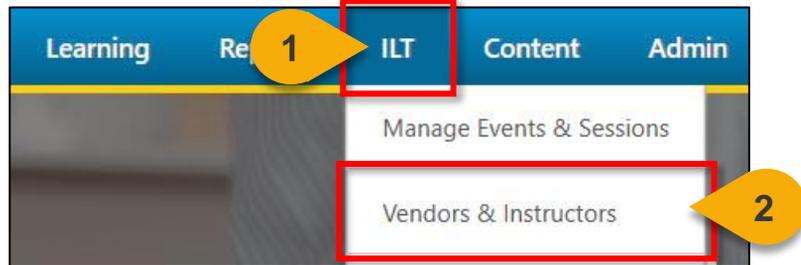
A screenshot of an 'Instructors' table. The table has columns: INSTRUCTOR NAME, LOCATION, E-MAIL, PHONE, SCHEDULE, ACTIVE, and EDIT. The 'View' link for the first instructor is highlighted with a red box and a yellow callout '4'. The table also includes a link 'Add New Instructor' and navigation links: « Previous 1-19 of 19 Next ».

INSTRUCTOR NAME	LOCATION	E-MAIL	PHONE	SCHEDULE	ACTIVE	EDIT
				View	<input checked="" type="checkbox"/>	
				View	<input checked="" type="checkbox"/>	
				View	<input checked="" type="checkbox"/>	
				View	<input checked="" type="checkbox"/>	

Add CSOD User as an Instructor

When you want to add an Instructor to your Schoolhouse...

Steps 1 & 2: Hover over the **ILT** tab, then select **Vendors & Instructors**.



Step 3: To the right of your Schoolhouse, click the **Instructors** link.

A screenshot of a 'Vendors' table. The table has columns: VENDOR NAME, CONTACT NAME, PHONE, ACTIVE, EDIT, and INSTRUCTORS. The 'INSTRUCTORS' column contains links for each vendor. A red box highlights the 'Instructors' link for the 'Federal - Instructor-Led (ILT)' vendor, with a yellow callout '3' pointing to it.

VENDOR NAME	CONTACT NAME	PHONE	ACTIVE	EDIT	INSTRUCTORS
Federal - DOE Acquisition Learning Center			Yes		Instructors
Federal - DOT			Yes		Instructors
Federal - EPA			Yes		Instructors
Federal - GSA Acquisition Institute			Yes		Instructors
Federal - HHS Acquisition Institute			Yes		Instructors
Federal - Homeland Security Acquisition Institute (HSAI)			Yes		Instructors
Federal - Instructor-Led (ILT)			Yes		Instructors
Federal - USAID PDT - Center for Continuous Learning			Yes		Instructors
Federal - VA Acquisition Academy (VAAA)			Yes		Instructors

Step 4: On the Instructors page, click the **Add New Instructor** link.

A screenshot of an 'Instructors' page. At the top left, there is a link 'Add New Instructor' with a plus icon, highlighted by a red box and a yellow callout '4'. Below the link is a table with columns: INSTRUCTOR NAME, LOCATION, E-MAIL, PHONE, SCHEDULE, ACTIVE, and EDIT. The table contains four rows of data for 'Federal Organizations - Locations'. A yellow callout '4' also points to the 'Add New Instructor' link.

INSTRUCTOR NAME	LOCATION	E-MAIL	PHONE	SCHEDULE	ACTIVE	EDIT
	Federal Organizations - Locations			View	<input checked="" type="checkbox"/>	
	Federal Organizations - Locations			View	<input checked="" type="checkbox"/>	
	Federal Organizations - Locations			View	<input checked="" type="checkbox"/>	
	Federal Organizations - Locations			View	<input checked="" type="checkbox"/>	

Add CSOD User as an Instructor (Cont. 1)

Step 5: Click on the **(select an existing User)** pop-out next to the Last Name field.

Edit Instructor

Instructor Name: First Name Last Name (select an existing user)

Home Location:

Phone:

Fax:

E-mail:

Language(s) Spoken:

Education:

Biography:

Certifications:

Active:

Step 6: Search for the User by First Name, Last name, or User ID. Click **Search** or hit Enter.

Find user

Search

Enter a last name and click the search icon.

Last Name: First Name: ID:

Step 7: In the search results, select the **Name** of the Instructor you wish to add.

Select a user « Previous 1-3 of 3 Next »

Users	
NAME	ORG UNIT
Instructor, FAI	organizations
Instructor 2, FAI	Federal Organizations
Instructor2, FAI	Acquisition Professional Career Program

Add CSOD User as an Instructor (Cont. 2)

Step 8: The User's name will appear in the Edit Instructor panel of the Add Instructor page. Click the **pop-out** next to Home Location to choose a location the Instructor will teach at.

Edit Instructor

Instructor Name: First Name: FAI Last Name: Instructor (select an existing)

Home Location:  8

Phone: _____

Fax: _____

E-mail: _____

Language(s) Spoken: _____

Education: _____

Biography: _____

Certifications: _____

Active:

Approval Required:

Step 9: A new window will open. Click on the **gray +** next to Federal Organizations – Locations to drill down to the location you would like to select.

ADD	TITLE	ID
	4th Estate DACM	4E
	ABC Location	
	Client Admin Location	CAL
	Cornerstone Admin Location	CSAL
	Defense Acquisition University (DAU)	Defense Acquisition University (DAU)
	Defense Media Activity (DMA)	DMA
	Defense Security Cooperation University (DSCU)	DSCU
	Defense Threat Reduction Agency (DTA)	DTRA
	Department of Defense Education Activity (DoDEA)	DoDEA
	Federal Organizations - Locations	FO_Locations

Step 10: When you find the location you need, click the **blue +** next to it to select it.

	Virtual Instructor-Led Training (FAI)	VILT_FAJ
-------------------------------------------------------------------------------------	---------------------------------------	----------

Add CSOD User as an Instructor (Cont. 3)

Step 11: The location will appear on the Edit Instructor panel on the Add Instructor page. You may fill in any additional information if desired. Then, click **Submit** to add the Instructor.

The screenshot shows the 'Add Instructor' form with the following fields and options:

- Instructor Name:** First Name (FAI), Last Name (Instructor) with a dropdown arrow and '(select an existing user)' text.
- Home Location:** Virtual Instructor-Led Training (FAI) with a dropdown arrow.
- Phone:** Text input field.
- Fax:** Text input field.
- E-mail:** Text input field.
- Language(s) Spoken:** Text input field.
- Education:** Text input field.
- Biography:** Text input field.
- Certifications:** Text input field.
- Active:**
- Approval Required:**
- Buttons:** Cancel, Submit (highlighted with a red box and a yellow callout bubble with the number 11).

Step 12: You will be returned to the Instructor list for your location. You will be able to view and edit the Instructor you added.

The screenshot shows the 'Instructors' list with the following columns: INSTRUCTOR NAME, LOCATION, E-MAIL, PHONE, SCHEDULE, ACTIVE, and EDIT. The first row is highlighted with a red box and a yellow callout bubble with the number 12.

INSTRUCTOR NAME	LOCATION	E-MAIL	PHONE	SCHEDULE	ACTIVE	EDIT
	Federal Organizations - Locations			View	<input checked="" type="checkbox"/>	
	Federal Organizations - Locations			View	<input checked="" type="checkbox"/>	
	Federal Organizations - Locations			View	<input checked="" type="checkbox"/>	
	Federal Organizations - Locations			View	<input checked="" type="checkbox"/>	

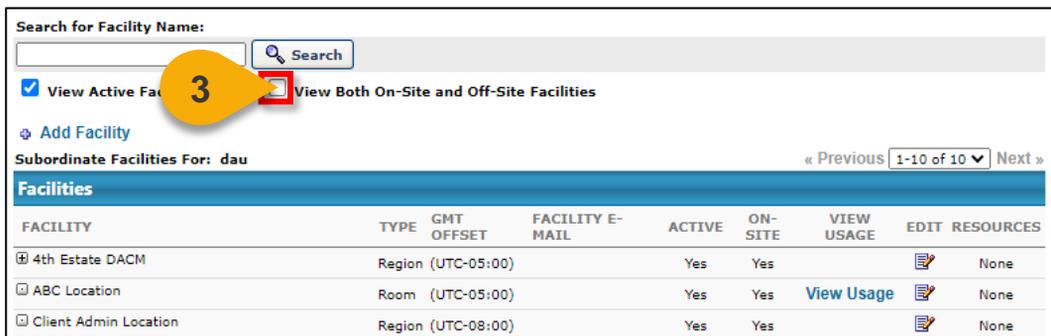
View Facilities for Your Schoolhouse

When you want to view available Facilities...

Steps 1 & 2: Hover over the **ILT** tab, then select **Facilities & Resources**.



Step 3: Select **View Both On-Site and Off-Site Facilities** to view both government and non-government Facilities that have been entered.



Step 4: On the Facilities and Resources page, click the **gray +** to drill down into Federal Organizations – Locations to the Facility you wish to view.



View Facilities for Your Schoolhouse (Cont.1)

Steps 5: Click **Edit icon** to view or edit the information for this Facility.

<input type="checkbox"/> Virtual Instructor-Led Training (FAI)	Region (UTC-05:00)	Yes	Yes	5 	None
----------------------------------------------------------------	--------------------	-----	-----	----------------------------------------------------------------------------------------------	------

Step 6: View or edit the information for the Facility. Click **Save** to save any information you entered or **Cancel** to exit without saving any information.

City	<input type="text"/>
State	----- None selected ----- ▼
Postal Code	<input type="text"/>
Time Zone	(UTC-05:00) Eastern Time (US & Canada) ▼
Contact	<input type="text"/>
Phone	<input type="text"/>
Fax	<input type="text"/>
Email	<input type="text"/>
Occupancy	<input type="text"/>
Approval Required	<input type="checkbox"/>
On Site	<input checked="" type="checkbox"/>
6  	

Add Facilities for Your Schoolhouse

When you want to add a Facility...

Use the instructions below to add a single location at a time. If your Agency has many locations you'd like to add, please reach out to faicsod@gsa.gov for assistance with a facility load.

Steps 1 & 2: Hover of the **ILT** tab, then select **Facilities & Resources**.



Step 3: Click the **Add Facility** link.

The screenshot shows a search bar for 'Facility Name' and a search button. Below the search bar are two checkboxes: 'View Active Facilities Only' (checked) and 'View Both On-Site and Off-Site Facilities' (unchecked). A red box highlights the 'Add Facility' link, with a yellow callout '3' pointing to it. Below the link is a table of facilities.

FACILITY	TYPE	GMT OFFSET	FACILITY E-MAIL	ACTIVE	ON-SITE	VIEW USAGE	EDIT	RESOURCES
4th Estate DACM	Region	(UTC-05:00)		Yes	Yes			None
ABC Location	Room	(UTC-05:00)		Yes	Yes	View Usage		None
Client Admin Location	Region	(UTC-08:00)		Yes	Yes			None

Step 4: The Create Location page will open. **Note:** Locations and Facilities are used interchangeably in CSOD. In the Define Location section, enter the following information for the Facility/Location: **Name**, a unique **ID**, and a brief **Description**.

The screenshot shows the 'Create Location' page. The 'Define Location' section is highlighted with a red box and a yellow callout '4'. It contains three input fields: 'Name', 'ID', and 'Description'.

Add Facilities for Your Schoolhouse (Cont. 1)

Step 5: In the Details Section, select a **Parent Location**. The Parent Location is the Location/Facility under which this new Location/Facility will appear. You may also choose an individual to be the **Owner** of this Location/Facility. This is optional.



Details

Parent Defense Acquisition University X

Owner

Step 6: Check the **Active** box to make this Facility/Location active in CSOD.



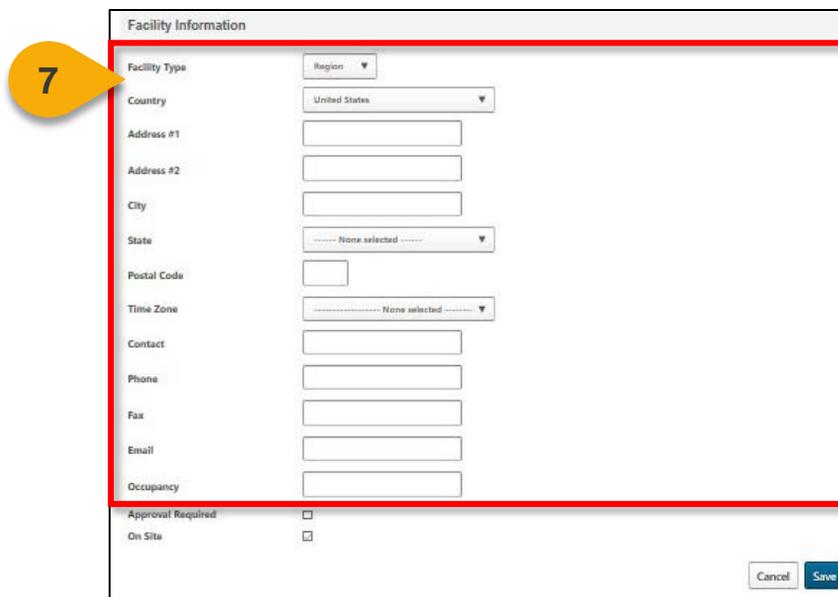
Details

Parent Defense Acquisition University X

Owner

Active

Step 7: In the **Facility Information** section, enter as many details as you can to help students find this Facility/Location. **Note:** The only required field is Time Zone. If you decide to add Occupancy, you won't be allowed to add more registrations than the Occupancy number when creating a Session.



Facility Information

Facility Type Region

Country United States

Address #1

Address #2

City

State None selected

Postal Code

Time Zone None selected

Contact

Phone

Fax

Email

Occupancy

Approval Required

On Site

Cancel Save

Add Facilities for Your Schoolhouse (Cont. 2)

Step 8: Do not check the **Approval Required** box. The Federal Organizations are not using this CSOD feature.

Facility Information

Facility Type: Region

Country: United States

Address #1: [Text Box]

Address #2: [Text Box]

City: [Text Box]

State: None selected

Postal Code: [Text Box]

Time Zone: None selected

Contact: [Text Box]

Phone: [Text Box]

Fax: [Text Box]

Email: [Text Box]

Occupancy: [Text Box]

Approval Required On Site: (with a red 'X' over it)

Buttons: Cancel, Save

Step 9: Check the **On-Site** box if this is a government Facility/Location. Otherwise, leave this box unchecked.

Facility Information

Facility Type: Region

Country: United States

Address #1: [Text Box]

Address #2: [Text Box]

City: [Text Box]

State: None selected

Postal Code: [Text Box]

Time Zone: None selected

Contact: [Text Box]

Phone: [Text Box]

Fax: [Text Box]

Email: [Text Box]

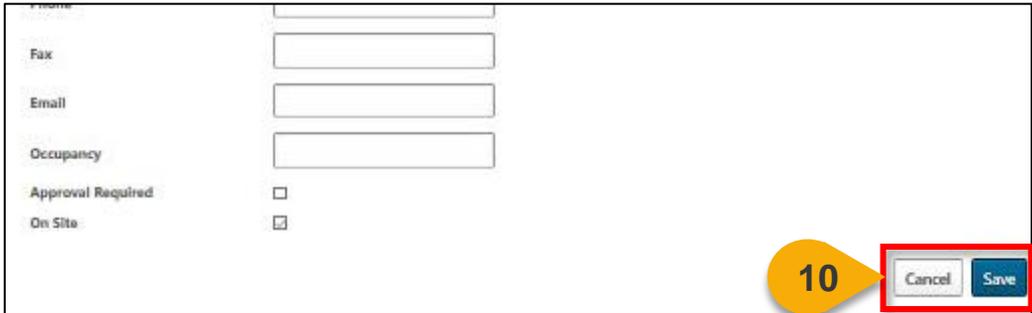
Occupancy: [Text Box]

Approval Required On Site:

Buttons: Cancel, Save

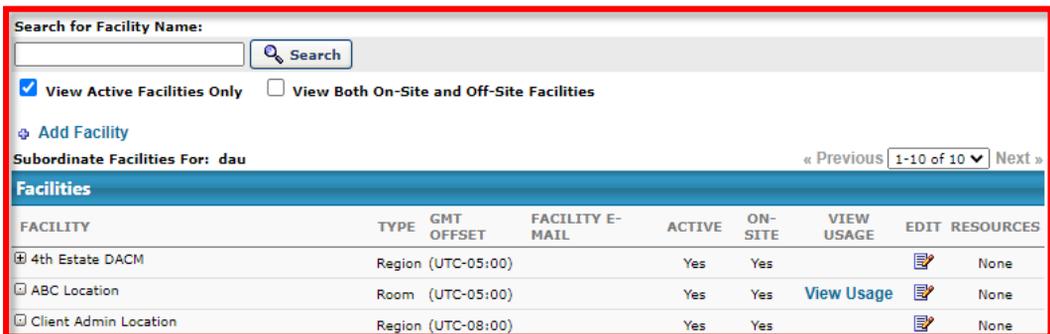
Add Facilities for Your Schoolhouse (Cont. 3)

Step 10: Click **Save** to save the Facility/Location. Click **Cancel** to return to the Facility page without saving.



A screenshot of a web form for adding a facility. The form includes input fields for 'Phone', 'Fax', 'Email', and 'Occupancy'. There are also checkboxes for 'Approval Required' and 'On Site'. At the bottom right, there are two buttons: 'Cancel' and 'Save'. A yellow callout bubble with the number '10' points to the 'Save' button, which is also highlighted with a red rectangular box.

You will return to the main Facilities page. From here, you can search for and view the Facility/Location you just added or add another Facility/Location.



A screenshot of the main Facilities page. It features a search bar at the top with a 'Search' button. Below the search bar are two checkboxes: 'View Active Facilities Only' (checked) and 'View Both On-Site and Off-Site Facilities'. There is an 'Add Facility' link and a 'Subordinate Facilities For: dau' label. A pagination control shows '« Previous 1-10 of 10 Next »'. Below this is a table with the following data:

FACILITY	TYPE	GMT OFFSET	FACILITY E-MAIL	ACTIVE	ON-SITE	VIEW USAGE	EDIT	RESOURCES
4th Estate DACM	Region	(UTC-05:00)		Yes	Yes			None
ABC Location	Room	(UTC-05:00)		Yes	Yes	View Usage		None
Client Admin Location	Region	(UTC-08:00)		Yes	Yes			None



Event & Session Management



Create Event

When you want to create a new Event...

Please contact FAI at faicsod@gsa.gov prior to creating any Events in CSOD.

Steps 1 & 2: Hover over the **ILT** tab, then select **Manage Events & Sessions**.



Step 3: Select **Create New Event**.

The image shows the 'Manage Events & Sessions' page. At the top, there are buttons for 'Waitlists', 'Exception Requests', and 'Interest Tracking'. Below that is a 'Search All Events' section with a search bar and radio buttons for 'Search for all Events' (selected) and 'Search for all Sessions'. There are input fields for 'Event Name', 'Subject', and 'Vendor', and a dropdown for 'All Languages'. Below that is a section for searching by locator number with a 'Locator Number' input field and a 'View Active Events Only' checkbox. A 'Search' button is at the bottom of this section. At the bottom of the page, there is a 'Legend' section with buttons for 'Edit Evaluation', 'View Evaluation Report', 'Edit Event', 'Copy Event', and 'View Sessions'. The 'Create New Event' button is highlighted with a red box and a yellow callout bubble containing the number '3'.

Create Event (Cont. 1)

Step 4: In the Properties tab, add the **Event Name**. The Event Name is the name of the course, such as ACQ 265 (FED): Mission Focused Services Acquisition.

The screenshot shows the 'Add New Event' form with the 'Properties' tab selected. The 'Event Name' field is highlighted with a red box, and a yellow callout bubble with the number '4' points to it. Other fields include 'Event Number', 'Vendor', 'Training Hours', 'Object ID', and 'Description'.

Step 5: Add the **Event Number**. The Event number can be similar to the Event name, for example, ACQ265(FED).

The screenshot shows the 'Add New Event' form with the 'Event Number' field highlighted with a red box, and a yellow callout bubble with the number '5' points to it. The 'Event Name' field is now empty.

Step 6: Select a **Vendor** for the Event.

The screenshot shows the 'Add New Event' form with the 'Vendor' dropdown menu highlighted with a red box, and a yellow callout bubble with the number '6' points to it. The 'Event Name' and 'Event Number' fields are now empty.

Create Event (Cont. 2)

Step 7: Enter **additional information** as applicable. As a Federal Organizations Registrar, you will likely enter: Training Hours, Description, Objectives, FAI Course Code, Continuous Education Units, Event Information, and Target Attendees.

7

Vendor:

Training Hours: hour(s) minute(s)

Object ID: dcb3133c-7bd9-4373-8958-acbf94d59e7b

Description:
B **I** **U** **☰** **☰**

Design HTML

Resources: [Add Attachment](#)
No attachments have been uploaded for this Event

Objectives:
B **I** **U** **☰** **☰**

Design HTML

Available Languages: English (US) Check all the languages that the content in this Event contains.

Default Language: English (US) : This is the language in which the event is shown to the user if this event's information is not localized in their language.

FAI Course Code:

Continuous Education Units:

Continuous Learning Points:

Event Information:

Predecessor Courses:

Target Attendees:

Resources: [Add Material](#)

Type	Title
------	-------

FAI Course Code: Enter the Course ID (Ex. ABC 123 (FED))

Step 8: Subjects is a required field. Select the **Add Subject link**.

8

Subjects: [Add Subject](#)

Competencies: [Add Competency](#)

Skills: [Add Skill](#)

Options: Active Allow Users To Attend Multiple Sessions Allow interest tracking

Ability to Select Sessions: Controls the visibility of the "Select Session" link for an Event on an end user's Transcript and Training Details.
 End Users Admins and Managers

Keywords:

Create Event (Cont. 3)

Step 9: Use the **gray +** to drill into Federal Subjects.

Find Subject

Search by subject name:

Subject Name

- Areas of Concentration
- Career Field
- Categories
- Content Area
- Delivery Mode
- Federal**
- LinkedIn Learning

Step 10: Use the **blue link** to select the applicable Subject(s).

Subject Name

- Areas of Concentration
- Career Field
- Categories
- Content Area
- Delivery Mode
- Acquisition Management**
- Auditing
- Business and Financial Management
- Contract Management
- Contracting
- Contracting Officer's Representative (COR)
- Cost Estimating
- Earned Value Management

Step 11: The Subject will be added to the Event on the Event page. Ensure **Active** and **Allow Interest Tracking** are checked. Check **Allow Users To Attend Multiple Sessions** only if the Event is for Brown Bags.

Subjects: [Add Subject](#)
Federal > Acquisition Management

Competencies: [Add Competency](#)

Skills: [Add Skill](#)

Options: Active Allow Users To Attend Multiple Sessions Allow interest tracking

Ability to Select Sessions: Controls the visibility of the "Select Session" link for an Event on an end user's Transcript and Training Details.

End Users Admins and Managers

Keywords:

Training Contact:

Created By: Amira Reiss on Monday, December 28, 2020
Last Modified By: Amira Reiss on Monday, December 28, 2020

Step 12: Add **Keywords** if desired.

Competencies: [Add Competency](#)

Skills: [Add Skill](#)

Options: Active Allow Users To Attend Multiple Sessions Allow interest tracking

Ability to Select Sessions: Controls the visibility of the "Select Session" link for an Event on an end user's Transcript and Training Details.

End Users Admins and Managers

Keywords:

Training Contact:

Created By: Amira Reiss on Monday, December 28, 2020
Last Modified By: Amira Reiss on Monday, December 28, 2020

Create Event (Cont. 4)

Step 13: Add a **Training Contact** for this Event if desired.

The screenshot shows a form with the following sections: Subjects (Add Subject, Federal > Acquisition Management), Competencies (Add Competency), Skills (Add Skill), Options (Active, Allow Users To Attend Multiple Sessions, Allow interest tracking), Ability to Select Sessions (Controls the visibility of the "Select Session" link for an Event on an end user's Transcript and Training Details), and End Users (checked), Admins and Managers (unchecked). A red box highlights the Training Contact field, which is currently empty. A yellow callout bubble with the number 13 points to this field. Below the form are buttons for Save, Cancel, and Next >.

Step 14: Click **Next** to save this information and move to the Availability tab.

This screenshot is identical to the previous one, but the Next > button is highlighted with a red box. A yellow callout bubble with the number 14 points to this button.

Step 15: In the Select Criteria drop down, click **Organization**.

The screenshot shows the Availability tab with a checked box for Copy Availability To New Sessions. Below this is an AVAILABILITY section with a dropdown menu for Select Criteria. The dropdown is open, showing options: All Users, Organization (highlighted with a red box and a yellow callout bubble with the number 15), Position, Grade, Location, Group, and Users. To the right of the dropdown are three tabs: INCLUDE SUBORDINATES, PRE-APPROVED, and REGISTER UPON APPROVAL.

Create Event (Cont. 5)

Step 16: Click the **pop-out** that appears next to the field.

Availability section showing a dropdown menu for Organization. A red box highlights the pop-out icon next to the dropdown, with a yellow callout bubble labeled 16.

Step 17: Click the **gray +** next to DAU Registrar to drill down within the Organizations.

Hierarchy	
ADD	TITLE
<input type="checkbox"/>	BAH
<input type="checkbox"/>	Client Admin Organization
<input type="checkbox"/>	Cornerstone Admin Organization
<input checked="" type="checkbox"/>	DAU Registrar
<input type="checkbox"/>	Non-Authenticated

Step 18: Click the **blue +** next to Federal Organizations to make this event open to all Users within the Federal Organizations hierarchy or continue to drill down. **Note:** We will be able to set more restrictive availability when creating sessions.

Hierarchy	
ADD	TITLE
<input type="checkbox"/>	4TH ESTATE
<input type="checkbox"/>	AIR FORCE
<input type="checkbox"/>	ARMY
<input type="checkbox"/>	Defense Security Cooperation Agency (DSCA)
<input checked="" type="checkbox"/>	Federal Organizations
<input type="checkbox"/>	FOREIGN MILITARY
<input type="checkbox"/>	INDUSTRY
<input type="checkbox"/>	NAVY

Step 19: Click the **Done** to add the availability.

Top Node : DAU Registrar

Selected Organization		
REMOVE	TITLE	ID
<input type="checkbox"/>	Federal Organizations	9A

(8 Results)

Hierarchy		
ADD	TITLE	ID
<input type="checkbox"/>	4TH ESTATE	KA
<input type="checkbox"/>	AIR FORCE	UE
<input type="checkbox"/>	ARMY	H4
<input type="checkbox"/>	Defense Security Cooperation Agency (DSCA)	KA6Z
N/A	Federal Organizations	9A
<input type="checkbox"/>	FOREIGN MILITARY	ZA
<input type="checkbox"/>	INDUSTRY	00
<input type="checkbox"/>	NAVY	UM

Close Done

Step 20: Check the **Include Subordinates**, **Pre-Approved**, and **Register Upon Approval** boxes. These options will ensure that all Federal Organizations Users will see the Event, that Users will not go through the workflow unless dictated in the Session, and that Users will not need to register themselves after they are approved.

Availability section showing the Include Subordinates, Pre-Approved, and Register Upon Approval checkboxes checked. A red box highlights these three checkboxes, with a yellow callout bubble labeled 20.

Create Event (Cont. 6)

Step 21: Click **Next** to save the availability and move to the Training Units tab.

The screenshot shows the 'Availability' tab with a 'Copy Availability To New Sessions' checkbox checked. Below it is an 'AVAILABILITY' section with a 'Select Criteria' dropdown menu. There are 'REMOVE CRITERIA' and 'INCLUDE CRITERIA' buttons. A list shows 'All users in Organization: Federal Organizations (9A)'. At the bottom, there are '« Back', 'Save', 'Cancel', and 'Next »' buttons. The 'Next »' button is highlighted with a red box, and a yellow callout bubble with the number 21 points to it.

Step 22: You will not use the Training Units tab. Click **Next** to advance to the Session Defaults tab.

The screenshot shows the 'Training Units' tab with three radio button options: 'Allow users to check out with training unit value' (selected), 'Disassociate pricing from monetary value', and 'Do not allow payment by training unit for...'. At the bottom, there are '« Back', 'Save', and 'Next »' buttons. The 'Next »' button is highlighted with a red box, and a yellow callout bubble with the number 22 points to it.

Step 23: Any information you enter in the Session Defaults will appear for all Sessions you create. You can enter this information now if it is standard text for all Sessions or enter the information when creating a specific Session. You can still edit the information in the Session.

In the **Resources** section, add any **attachments**, if applicable.

The screenshot shows the 'Session Defaults' tab with a 'RESOURCES' section. An 'Add Attachment' button with a plus icon is highlighted with a red box. Below it, text reads 'No attachments have been uploaded for this Session'. A yellow callout bubble with the number 23 points to the 'Add Attachment' button.

Step 24: In the Registration section, set the **Registration Deadline**. This value is the amount of time before the start date where you will cut off registration of new students.

The screenshot shows the 'REGISTRATION' section with a 'Registration Deadline' field. The field is highlighted with a red box. Below it are 'Minimum Registration' and 'Maximum Registration' fields. A yellow callout bubble with the number 24 points to the 'Registration Deadline' field.

Step 25: Set the **Minimum Registration** and **Maximum Registration** for Sessions in this Event. These fields are required but can be updated at the Session level.

The screenshot shows the 'REGISTRATION' section with 'Minimum Registration' and 'Maximum Registration' fields. These two fields are highlighted with a red box. A yellow callout bubble with the number 25 points to the 'Maximum Registration' field.

Create Event (Cont. 7)

Step 26: If the same vendor is providing all instances of this training, enter this vendor in the **Delivered By** field.

A screenshot of a registration form. The 'Delivered By' field is highlighted with a red box and a yellow callout bubble containing the number 26. Other fields visible include 'Minimum Registration', 'Maximum Registration', 'Payment Received Date', and 'Payment'.

Step 27: In the Enrollment section, select **None**. You will set this when creating Sessions.

A screenshot of the 'ENROLLMENT' section. The 'None' radio button is selected and highlighted with a red box and a yellow callout bubble containing the number 27. Other options include 'Place Enrollment Restrictions' and 'Manage Reservations and Restrictions'. A note above the options states: 'Once users are registered in this session, some enrollment options may not be available.'

Step 28: In the Waitlist Section, ensure **Allow waitlist for sessions in this event**, **Allow Auto-Management of Waitlist**, **Grant waitlist opening to one User at a time based on priority**, **Auto-Register User upon Granting Waitlist**, and **Limit Users to one waitlist per event** are all checked.

A screenshot of the 'WAITLIST' section. A red box highlights several checked options: 'Allow waitlist for sessions in this event', 'Allow Auto-Management of Waitlist', 'Grant waitlist opening to one user at a time based on priority', 'Auto-Register User upon Granting Waitlist', and 'Limit users to one waitlist per event'. A yellow callout bubble with the number 28 points to the 'Grant waitlist opening...' option. Below the options are input fields for 'Waitlist Students have', 'Deadlines: register for a class after a waitlist opening is granted', and 'Waitlist expires'.

Step 29: Set the **Waitlist Expiration** for this Event, if applicable.

A screenshot of the 'WAITLIST' section. The 'Waitlist expires' field is highlighted with a red box and a yellow callout bubble containing the number 29. The field is set to '0 days and 23 hours before session start date'. Other options are visible, including 'Allow waitlist for sessions in this event', 'Allow Auto-Management of Waitlist', and 'Grant waitlist opening to one user at a time based on priority'.

Step 30: Move to the Prerequisites section. Add Prerequisites if applicable by selecting **Add New Option**. The prerequisite must be in CSOD to be selected.

A screenshot of the 'PREREQUISITES' section. The 'Add New Option' button is highlighted with a red box and a yellow callout bubble containing the number 30. Below the button is a table with columns for 'NAME', 'TYPE', and 'OPTIONS'.

Step 31: Move to the Additional Requirements section. **Add Pre-Work** or **Add Post-Work** if applicable.

A screenshot of the 'ADDITIONAL REQUIREMENTS' section. The 'Add Pre-Work' and 'Add Post-Work' buttons are highlighted with a red box and a yellow callout bubble containing the number 31. Below the buttons is a note: 'Times in [] Select this option if you would like the Start and End times Time Zone of for all Sessions to display to Users in their Time Zone. User: Typically, this option is useful if users can join remotely.'

Create Event (Cont. 8)

Step 32: Click **Save** to save this Event.

ADDITIONAL REQUIREMENTS

Pre-Work: [Add Pre-Work](#)

Post-Work: [Add Post-Work](#)

Display Times in Time Zone of User: Select this option if you would like the Start and End times for all Sessions to display to Users in their Time Zone. Typically, this option is useful if users can join remotely.

32

You will be returned to your Manage Events & Sessions page. From here, you can search for and view the Event you created.

Search All Events

Search for events or sessions

Search for all Events Search for all Sessions

Event Name Subject Vendor

All Languages

or search for sessions directly by using locator number

Locator Number View Active Events Only

Legend

[Create New Event](#) [Export to Excel](#)

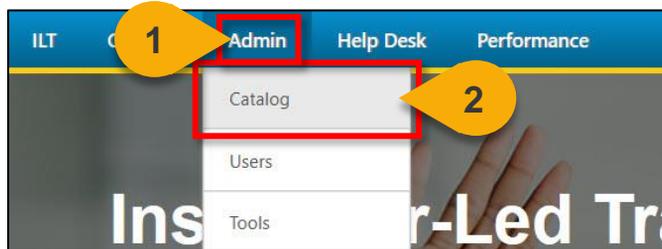
Events (40 Results) 1 2 >

Event Name	Subjects	Vendor	Language(s)	Tentative Sessions	Approved Sessions	Completed Sessions	Evaluation	Options
ACQ 265 (FED): Mission Focused Services Acquisition	Federal	Federal - Instructor-Led (ILT)	English (US)	0	2	0		

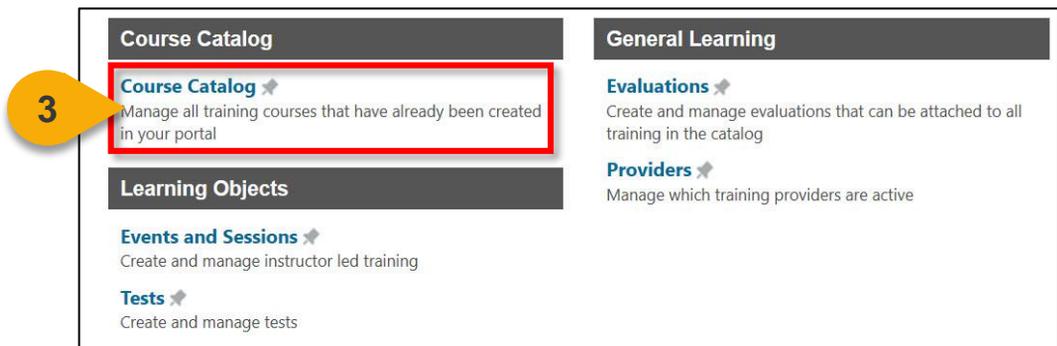
Edit Event

When you want to edit an Event...

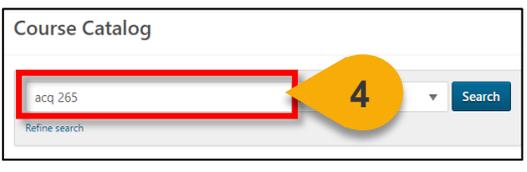
Steps 1 & 2: Hover over the **Admin** tab, then select **Catalog**.



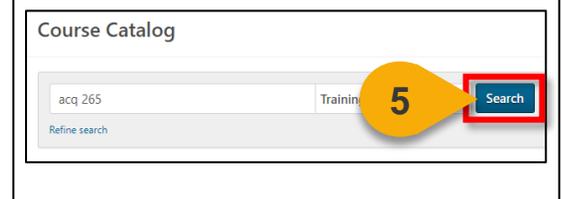
Step 3: Click on **Course Catalog** under Course Catalog heading.



Step 4: Enter the name of the Event you are looking for into the **search** field.



Step 5: Click **Search**.



Step 6: Click the **arrow** in the Actions column to the right of the Event name.

<input checked="" type="checkbox"/>	Title	Provider	Version	Language	Created Date	Modified Date	Actions
<input checked="" type="checkbox"/>	 ACQ 265 (FED): Mission Focused Services Acquisition	Federal - Instructor-Led (ILT)	N/A	English (US)	11/17/2020		

Edit Event (Cont. 1)

Step 7: Choose **Edit** from the dropdown menu.

<input checked="" type="checkbox"/>	Title	Provider	Version	Language	Created Date	Modified Date	Actions
<input checked="" type="checkbox"/>	 ACQ 265 (FED): Mission Focused Services Acquisition	Federal - Instructor-Led (ILT)	N/A	English (US)	11/17/2020	12/18/2020	<div style="border: 1px solid black; padding: 2px;"> 7 Edit View as User </div>
<input checked="" type="checkbox"/>	 DHS: ACQ 265	Federal - Homeland Security Acquisition Institute (HSAI)	N/A	English (US)	9/17/2020	12/18/2020	

Step 8: Use the **tabs** along the top of the page to edit different elements of this Event.

Edit ACQ 265 (FED): Mission Focused Services Acquisition

Select any of the tabs below to edit course information. Moving to a different tab will automatically save the information on the previous page.

General	Subjects	Skills	Competencies	Acknowledgement	Availability	Emails	Recommendations	Training
---------	----------	--------	--------------	-----------------	--------------	--------	-----------------	----------

8

Edit Training

Title: ACQ 265 (FED): Mission Focused Services Acquisition

Provider: Federal - Instructor-Led (ILT)

Type: Event

Version: 1.0

Step 9: To edit the emails that are sent for this Event, click the **Emails** tab.

Edit ACQ 265 (FED): Mission Focused Services Acquisition

Select any of the tabs below to edit course information. Moving to a different tab will automatically save the information on the previous page.

General	Subjects	Skills	Competencies	Acknowledgement	Emails	Recommendations	Training
---------	----------	--------	--------------	-----------------	--------	-----------------	----------

9

Edit Training

Step 11: Select **Custom Emails** to edit the emails sent for this Event.

General	Subjects
Select Email Configuration	
<input type="radio"/> System Defaults - Use default emails based on settings a administration area will send emails that have not yet b	
<input checked="" type="radio"/> Custom Emails - Use custom emails that have been created to this learning objec emails sent related to this learning object will be sent based on	
<input type="radio"/> No Emails - No emails will be sent in association with th	

11

Step 12: A panel will open in the bottom portion of the page. Click the **gray +** next to the email you wish to edit.

Email Administration	
ACTION	ACTION
+	Request Webcast
+	Instructor Training
+	Training

12

Edit Event (Cont. 2)

Step 13: Check **Active** column for the Federal Organizations email that you would like to trigger for this email.

EMAIL	AVAILABILITY	CUSTOM DEACTIVATION	ACTIVE	OPTIONS
User Has Been Added to a Waitlist	All users in Organization: Federal Organizations (Include Subordinates)		<input checked="" type="checkbox"/>	 

The emails currently set up for Federal Organizations are generic for all Agencies. If you require custom email language for your Agency, please contact faicsod@gsa.gov.

Step 14: Click **Save** or navigate to another tab to save your email choices.

Training Approval Reminder
Training Deactivation
<input type="button" value="Cancel"/> <input checked="" type="button" value="Save"/>

Step 15: To update the Evaluation used for this Event, click the **Evaluations** tab.

Availability	Emails	Recommendations	Training	Evaluations
--------------	--------	-----------------	----------	--------------------

Step 16: Check the **box** in the Active column to activate Level 1 Evaluation for this Event.

EVALUATION	ACTIVE	REQUIRED	INCLUDE PRE-TRAINING	PREVIEW
Level 1 - Reaction Evaluation	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	N/A	

Step 17: Check the **box** in the Required column to require Users complete Evaluation for this Event.

EVALUATION	ACTIVE	REQUIRED	INCLUDE PRE-TRAINING	PREVIEW
Level 1 - Reaction Evaluation	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	N/A	

Edit Event (Cont. 3)

Step 18: Click the **pop-out** in the Options column to select the Evaluation for this Event.

REQUIRED	INCLUDE PRE-TRAINING	PREVIEW	TITLE	OPTIONS
<input checked="" type="checkbox"/>	N/A		Od.ILT/VILT v4 - Updated	18

Step 19: Click the **blue +** next to the Evaluation you wish to use for this Event.

	End of Course Evaluation OLT	English (US)	9/24/2018 10:15:57 AM	9/24/2018 10:16:38 AM
	Federal ILT Evaluation (FY21)	English (US)	9/25/2020 5:00:12 PM	11/3/2020 12:30:05 PM
	Federal OLT Evaluation (FY21)	English (US)	9/25/2020 2:30:00 PM	11/3/2020 12:30:55 PM
	FPD End of Course Evaluation (ILT/VILT) 2	English (US)	10/30/2018 1:10:19 PM	12/19/2018 3:16:26 PM

You will be returned to the Evaluations tab. You can view the Evaluation you chose under the **Title** column.

INCLUDE PRE-TRAINING	PREVIEW	TITLE	TYPE	OPTIONS
N/A		Federal ILT Evaluation (FY21)	Custom	

Step 20: Click **Save** or navigate to another tab to save these changes.

Evaluations

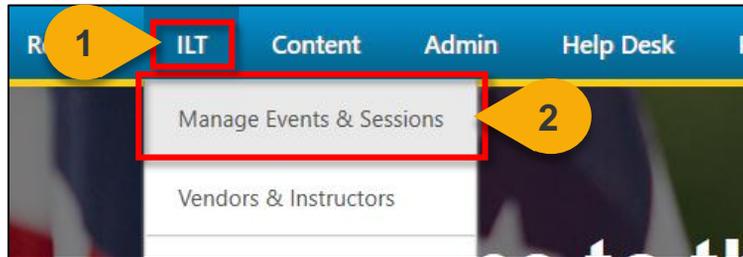
EVALUATION	ACTIVE
Level 1 - Reaction Evaluation	<input checked="" type="checkbox"/>

20

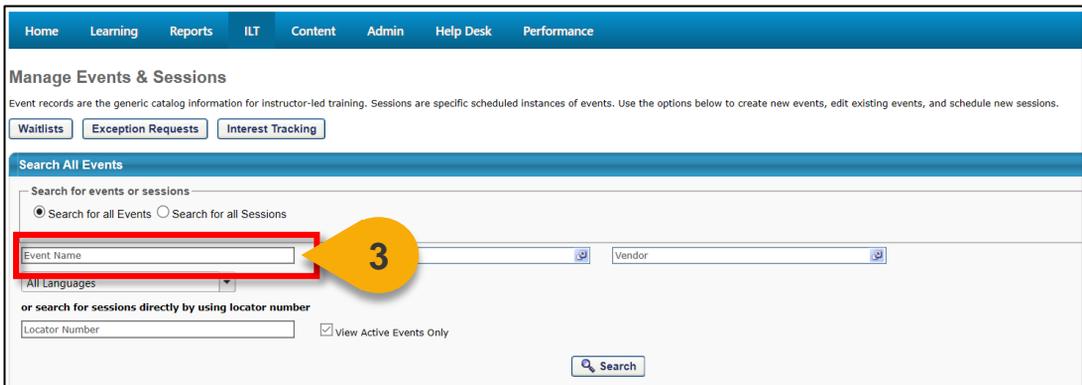
Create Sessions

When you want to create a Session...

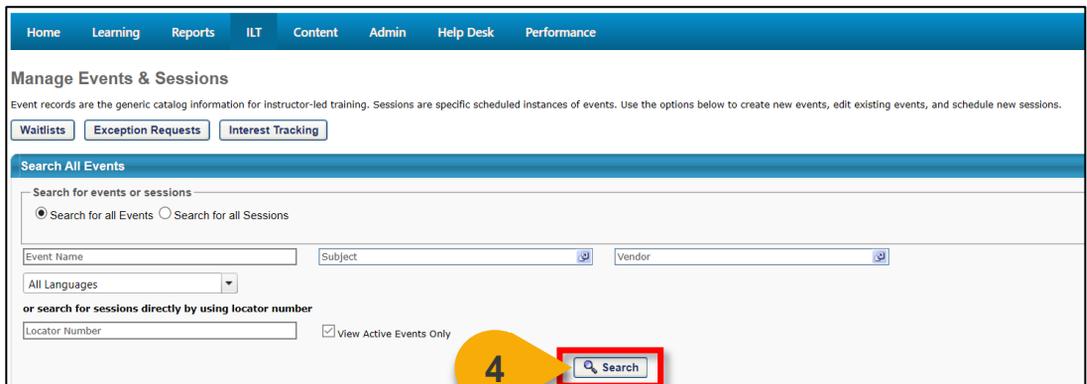
Steps 1 & 2: Hover over the **ILT** tab, then select **Manage Events & Sessions**.



Step 3: Search for the Event to which the Session will belong. Enter the **Event Name** into the search field.



Step 4: Click **Search** or hit Enter.



Create Sessions (Cont.1)

Step 5: Select the **View Sessions** icon under the Options column to the right of the Event name.

Subjects	Vendor	Language(s)	Tentative Sessions	Approved Sessions	Completed Sessions	Evaluation	Options
Federal	Federal - USAID PDT - Center for Continuous Learning	English (US)	0	2	0		
Federal	Federal - Homeland Security Acquisition Institute (HSAI)	English (US)	0	2	0		
Federal	Federal - DOE Acquisition Learning Center	English (US)	0	2	0		

Step 6: Click **Create New Session**.

6 

Sessions

Day	Start Date	End Date	Session ID
Friday			
Friday			

Step 7: In the **Parts Schedule** tab, enter the **Part Name**. The Part Name should include the schoolhouse providing the Session, the course number, the fiscal year, and the Session number. Example: DHS: ACQ 265-2021-01.

ACQ 265 (FED): Mission Focused Services Acquisition
- Created by Amira Reiss on 12/28/2020

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Session **Edit Part**

Parts Schedule

Details
Availability
Emails

Description:
Location:

Step 8: Enter a **Description** for this Session (optional).

ACQ 265 (FED): Mission Focused Services Acquisition
- Created by Amira Reiss on 12/28/2020

8 

Session **Edit Part**

Parts Schedule

Details
Availability
Emails

Name:
Description:
Location:

Create Sessions (Cont. 2)

Step 9: Choose a Location for this Session by clicking the **pop-out** next to the Location field.

ACQ 265 (FED): Mission Focused Services Acquisition
- Created by Amira Reiss on 12/28/2020

Session	Edit Part
Parts Schedule	Name: <input type="text"/>
Details	Description: <input type="text"/>
Availability	Location: <input type="text"/> 
Emails	Select Room Layout <input type="button" value="Add Resource"/> <input type="button" value="Add Instructor"/>

Step 10: Click the **gray +** next to a Location to drill down to the Location for this Session.

Hierarchy

ADD	TITLE
	Federal Organizations - Locations

Step 11: Click the **blue +** next to a Location to select it.

-  FAI: VIENNA, VA
-  FAI: WASHINGTON, DC
-  Instructor-Led Training (FAI)

Step 12: The Facility Details window will appear. Click **Done** to add this Location to the Session.

Facility Details

Facility: Virtual Instructor-Led Training (FAI)

Confirmation Required: Require the location to be confirmed before the session is approved*

Notes:

(*If the "Confirmation Required" checkbox is not checked, the session will be approved even if the facility is not available)

Step 13: Click **Add Instructor** to assign an Instructor to this Session.

ACQ 265 (FED): Mission Focused Services Acquisition
- Created by Amira Reiss on 12/28/2020

Session	Edit Part
Parts Schedule	Name: <input type="text"/>
Details	Description: <input type="text"/>
Availability	Location: <input type="text"/> 
Emails	Select Room Layout <input type="button" value="Add Resource"/> <input type="button" value="Add Instructor"/>

Create Sessions (Cont. 3)

Step 14: Click the **Name** of the User you would like to make the Instructor of this Session.

Name	User ID	Location
[Redacted]	DAU0828800034	Federal Organizations - Locations
[Redacted]	DAU0630700347	Federal Organizations - Locations
[Redacted]	DAU13084000581	Federal Organizations - Locations
[Redacted]	DAU13014001061	Federal Organizations - Locations

Step 15: In the Instructor Details window, click **Done** to add this Instructor to the Session.

Instructor Details

Instructor: [Redacted]
Role: Primary

Confirmation Required: Require the instructor to be confirmed before the session is approved*
(*If the "Confirmation Required" checkbox is not checked, the session will be approved even if the instructor is not available)

« Back Done

Step 16: In the Date and Time section, enter a **Start Date** and **End Date** for this Session.

DATE AND TIME

Start Date: 1/11/2021 End: 1/14/2021

Start Time: 8:00 AM End: 5:00 PM

Time Zone: (UTC-05:00) Eastern Time (US & Canada) Display Times in Time Zone of User

Part Duration: 81 Hour(s) 0 Minute(s)

Step 17: Enter a **Start Time** and **End Time**.

DATE AND TIME

Start Date: 1/11/2021 End: 1/14/2021

Start Time: 8:00 AM End: 5:00 PM

Time Zone: (UTC-05:00) Eastern Time (US & Canada) Display Times in Time Zone of User

Part Duration: 81 Hour(s) 0 Minute(s)

Step 18: Select the **Time Zone** for the Session.

DATE AND TIME

Start Date: 1/11/2021 End: 1/14/2021

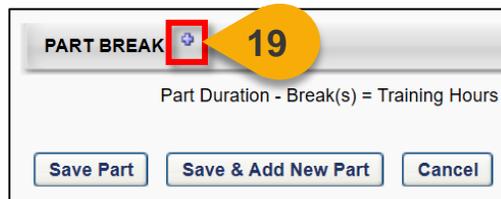
Start Time: 8:00 AM End: 5:00 PM

Time Zone: (UTC-05:00) Eastern Time (US & Canada) Display Times in Time Zone of User

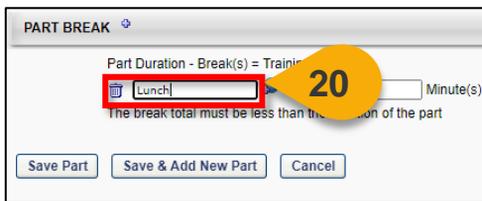
Part Duration: 81 Hour(s) 0 Minute(s)

Create Sessions (Cont. 4)

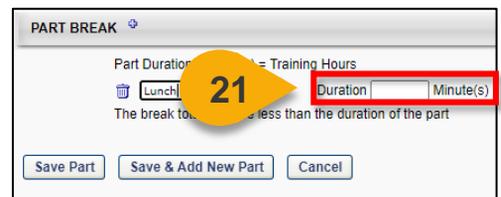
Step 19: If you would like CSOD to keep track of the amount of time students are actually in the Session, you can create Part Breaks. For example, if a part has a Start Time of 8:00 AM, an End Time of 5:00 PM, and a Part Break of 30 minutes, then the total training hours for the part is 8.5 hours. Part Breaks are not required and will not impact CLPs. To add a Part Break, click the **blue +** next to Part Break.



Step 20: Label the Part Break.



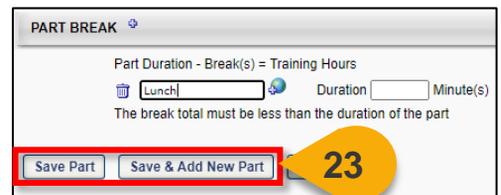
Step 21: Set the Part Duration in minutes.



Step 22: Add additional Part Breaks as needed by clicking the **blue +. (See note below on adding parts)**



Step 23: Click **Save & Add New Part to create another Part for this Session (this functionality is frequently used for multi-day Sessions) or click **Save Part** to save this information.**



If the session duration is more than a day, or if separate sessions within the same day are required, add the session parts by clicking the Add Part link on the Parts Schedule page. See [Create Session –Parts](#) on CSOD's Online Help for more information.

Create Sessions (Cont. 5)

Step 24: You will now see a Summary of the Part information for this Session. Click the **Details** tab in the left-hand menu.

Day	Part Name	Starts	Ends	Training Hours	Location	Instructor	Options
Monday	DOE: ACQ 265FED-2021-01	1/11/2021 8:00 AM EST	1/14/2021 5:00 PM EST	81 Hour(s) 0 Minute(s)	Virtual Instructor-Led Training (DOE)	FAI Instructor (Primary)	

Step 25: The Session will inherit any defaults set at the Event level. You may change these values if required. Enter the Part Name you chose into the **Session ID** field.

Session ID:

Available Languages:

Credits:

Delivered By:

Payment Received Date:

Payment:

Step 26: If this Session is offered by an external training vendor, enter that Vendor into the **Delivered By** field.

Session ID:

Available Languages:

Credits:

Delivered By:

Payment Received Date:

Payment:

Step 27: Enter **Session Information**. Session information is any additional information you'd like Users to have about this Session.

Code:

Session Information:

Continuous Education Units:

Continuous Learning Points:

Host School Code:

Target Attendees:

Step 28: Enter the correct number of **Continuous Learning Points (CLPs)** for this Session.

Code:

Session Information:

Continuous Education Units:

Continuous Learning Points:

Host School Code:

Target Attendees:

Create Sessions (Cont. 6)

Step 29: Choose a **Training Contact**. The Registrar creating the Session will be listed as default.

Target Attendees:

Training Contact: 

RESOURCES

Add Attachment 

No attachments have been uploaded for this Session

Step 30: If there are resources Users need prior to the Session, add them to the Resources section by clicking the **blue +** next to Add Attachment.

Target Attendees:

Training Contact: 

RESOURCES

Add Attachment 

No attachments have been uploaded for this Session

Step 31: In the Registration section, enter the **Attendance** requirements. This field will dictate how many parts Users must attend to get credit for the course.

REGISTRATION

Attendance: 1 of 1 parts must be marked as attended for a session to be marked completed in the user's transcript

Registration Deadline: 1 Day(s) Before first part of session starts. (Request and Register)

Before: (Session Start Date and Time - Timing Selected Above = Registration Deadline)
After: (Session Start Date and Time + Timing Selected Above = Registration Deadline)

Minimum Registration: 0
Maximum Registration: 15

Step 32: If applicable, set the **Registration Deadline** by indicating at which point Users can no longer Register or Request the Session.

REGISTRATION

Attendance: 1 of 1 parts must be marked as attended for a session to be marked completed in the user's transcript

Registration Deadline: 1 Day(s) Before first part of session starts. (Request and Register)

Before: (Session Start Date and Time - Timing Selected Above = Registration Deadline)
After: (Session Start Date and Time + Timing Selected Above = Registration Deadline)

Minimum Registration: 0
Maximum Registration: 15

Step 33: Edit the **Minimum Registration** and **Maximum Registration** fields if these values are different than those entered for the Event.

Minimum Registration: 0
Maximum Registration: 15

ENROLLMENT RESERVATIONS AND RESTRICTIONS

Once users are registered in this session, some enrollment

Step 34: Use the Enrollment Reservations and Restrictions section to send all Users outside your schoolhouse to the waitlist. Select **Manage Reservations and Restrictions**.

ENROLLMENT RESERVATIONS AND RESTRICTIONS

Once users are registered in this session, some enrollment options may not be available.

Enrollment reservations and restrictions:

None
 Place Enrollment Restrictions
 Manage Reservations and Restrictions

Create Sessions (Cont. 7)

Step 35: A drop-down menu will appear. Choose **Organization**.

ENROLLMENT RESERVATIONS AND RESTRICTIONS

Once users are registered in this session, some enrollment options may not be available.

Enrollment reservations and restrictions: None Place Enrollment Restrictions Manage Reservations and Restrictions

None selected
 None selected
 Organization
 Maximum Seats Allowed

35

Step 36: Click the **pop-out** next to Organization to view the list of Organizations.

ENROLLMENT RESERVATIONS AND RESTRICTIONS

Once users are registered in this session, some enrollment options may not be available.

Enrollment reservations and restrictions: None Place Enrollment Restrictions Manage Reservations and Restrictions

Organization

36

Step 37: In the window that opens, click the **gray +** next to DAU Registrar to drill down to your Schoolhouse.

Title	ID
BAH	BAH
Client Admin Organization	CAO
Cornerstone Administration Organization	CSAO
<input checked="" type="checkbox"/> DAU Registrar	XX
Non-Authenticated	NOAUTH

37

Step 38: Continue to drill down into the Federal Organizations. When you reach your Schoolhouse, click **Title** of the Organization.

Title	ID
<input checked="" type="checkbox"/> ATRRS Federal Orgs	AFO
<input checked="" type="checkbox"/> Department of Agriculture	9ALA
<input checked="" type="checkbox"/> Department of Commerce	9ALB
<input checked="" type="checkbox"/> Department of Education	9AL3
<input checked="" type="checkbox"/> Department of Energy	9ALE

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Step 39: Click **Add** at the bottom of the window.

Selected Organization

TITLE	ID
Department of Energy	9ALE

(30 Results) 1 2 3 >>

All > Defense Acquisition University (DAU) > DAU Registrar > Federal Organizations >

Title	ID	Parent
<input checked="" type="checkbox"/> ATRRS Federal Orgs	AFO	Federal Organizations
<input checked="" type="checkbox"/> Department of Agriculture	9ALA	Federal Organizations
<input checked="" type="checkbox"/> Department of Commerce	9ALB	Federal Organizations
<input checked="" type="checkbox"/> Department of Education	9AL3	Federal Organizations
<input checked="" type="checkbox"/> Department of Energy	9ALE	Federal Organizations
<input checked="" type="checkbox"/> Department of Health & Human Services	9ALL	Federal Organizations

Add

39

Create Sessions (Cont. 8)

Step 40: The Organization will appear in the Enrollment Reservations and Restrictions section. Enter the value from Maximum Registration into **Reserved Seats** and **Maximum Seats Allowed**.

All Users outside your Organization will now be sent to the Waitlist and Users within your Organization will be automatically approved for a seat.

Manage Reservations and Restrictions

Organization: Department of Energy

Order	Criteria	Include Subordinates	Reserved Seats	Maximum Seats Allowed	Remove
0	All users in Organization	<input checked="" type="checkbox"/>	15	15	

Step 41: In the Waitlist Section, ensure **Allow waitlist for sessions in this event**, **Allow Auto-Management of Waitlist**, **Grant waitlist opening to one User at a time based on priority**, **Auto-Register User upon Granting Waitlist**, and **Limit Users to one waitlist per event** are all checked.

WAITLIST

Options:

- Allow waitlist for sessions in this event
- Allow Auto-Management of Waitlist
- Grant waitlist opening to one user at a time based on priority
- Grant opening to all waitlisted users at once for first come first served registration
- Auto-Register User upon Granting Waitlist
- Limit users to one waitlist per event

Waitlist Deadlines: Waitlist expires 0 days and 0 hours before session start date.

Step 42: If you would like the Waitlist to expire, enter the criteria for that expiration in the **Waitlist Deadlines fields**.

WAITLIST

Options:

- Allow waitlist for sessions in this event
- Allow Auto-Management of Waitlist
- Grant waitlist opening to one user at a time based on priority
- Grant opening to all waitlisted users at once for first come first served registration
- Auto-Register User upon Granting Waitlist
- Limit users to one waitlist per event

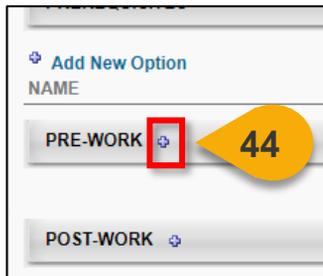
Waitlist Deadlines: Waitlist expires 0 days and 0 hours before session start date.

Create Sessions (Cont. 9)

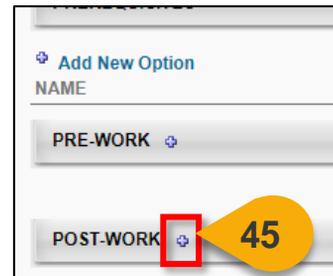
Step 43: If the Session has a prerequisite, click **Add New Option** in the Prerequisites section.



Step 44: If the Session has pre-work, click the **blue +** in the Pre-Work section to add it to the Session.



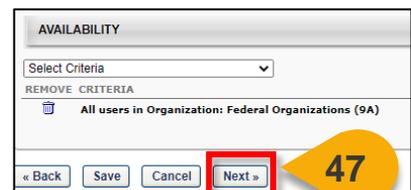
Step 44: If the Session has post-work, click the **blue +** in the Post-Work section to add it to the Session.



Step 46: At the bottom of the page, click **Next** to save these inputs and go to the Availability tab.



Step 47: Availability dictates who can find the Session in their search results and request to enroll. While the Session will inherit the availability of the Event, you can make it only available to your Organization. Most Sessions will use the inherited availability. See the “Create an Event” task aid for more details on setting availability. Confirm the availability and click **Next**.



Create Sessions (Cont. 10)

Step 48: The email settings will be inherited from the event. Confirm the emails you would like to use are selected. Click **Next**.

<input checked="" type="checkbox"/> Session Transcript Status Changed by Roster Submission	Instructor Led Training
<input type="checkbox"/> Training Completion Request	Training
<input type="checkbox"/> Training Completion Request Approved	Training
<input type="checkbox"/> Training Completion Request Denied	Training
<input checked="" type="checkbox"/> Training Approval Reminder	Training

« Back Save Cancel **Next »**

48

Step 49: You will not use the Training Units tab. Click **Next**.

Training Units

Allow users to check out with training unit

Disassociate pricing from monetary value

Do not allow payment by training unit for t

« Back Save **Next »**

49

Step 50: The Summary tab will allow you to review the decisions you made on the previous tabs. Confirm these settings and click **Save** to create the Session.

Training Hours: 81 Hour(s) 0 Minute(s)

Day	Part Name
Monday	DOE: ACQ 265FED-2021-01

« Back **Save** Cancel

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Create Sessions (Cont. 11)

The Session is now available to Users. You will be returned to the Event page, where the Session is now listed. From here, you can **view the Roster**, **edit the Session**, **copy the Session**, or **cancel the Session**.

ACQ 265 (FED): Mission Focused Services Acquisition

Search

Tentative Approved Completed Cancelled

Session ID: Locator Number: Start Date: to

Location: Instructor:

[Create New Session](#)

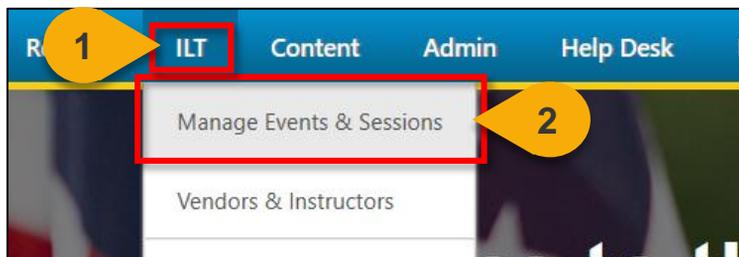
Sessions (2 Results)

Day	Start Date	End Date	Session ID	Locator Number	Location	Enrollment	Evaluation	Status	Options
Monday	1/11/2021	1/14/2021	DOE: ACQ 265FED-2021-01	47866	Virtual Instructor-Led Training (DOE)	0 of 15	  	Approved	  

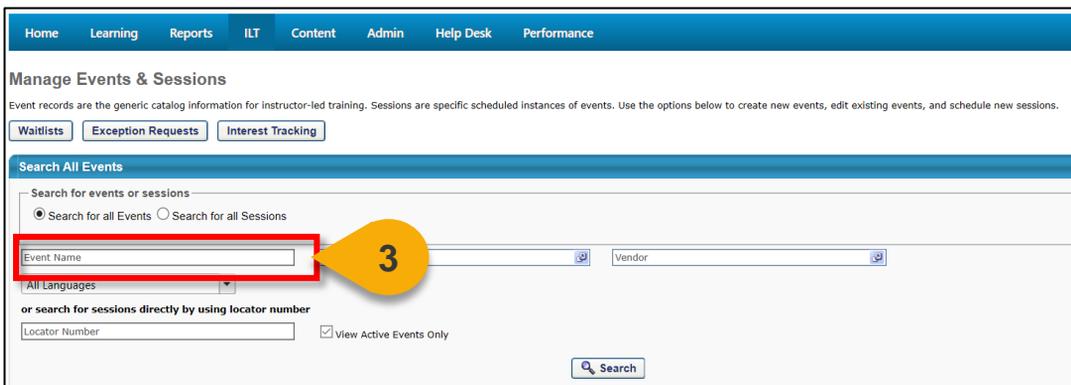
Edit Sessions

When you want to edit a Session you've created...

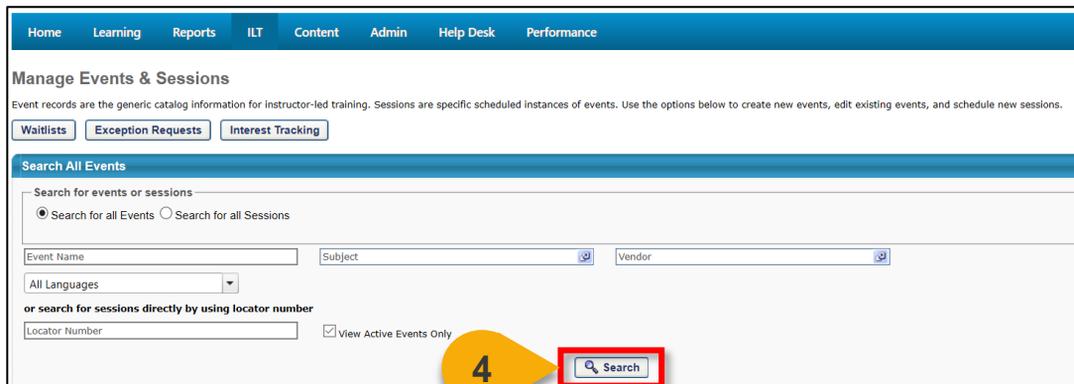
Steps 1 & 2: Hover over the **ILT** tab, and then select **Manage Events & Sessions**.



Step 3: Search for the Event to which the Session will belong. Enter the **Event Name** into the search field.



Step 4: Click **Search** or hit **Enter**.



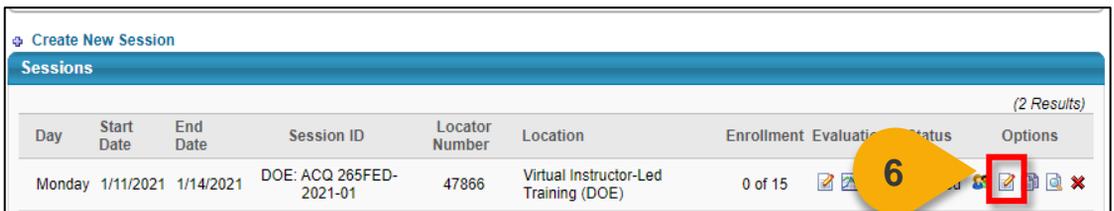
Edit Sessions (Cont. 1)

Step 5: Select the **View Sessions icon** under the Options column to the right of the Event name.



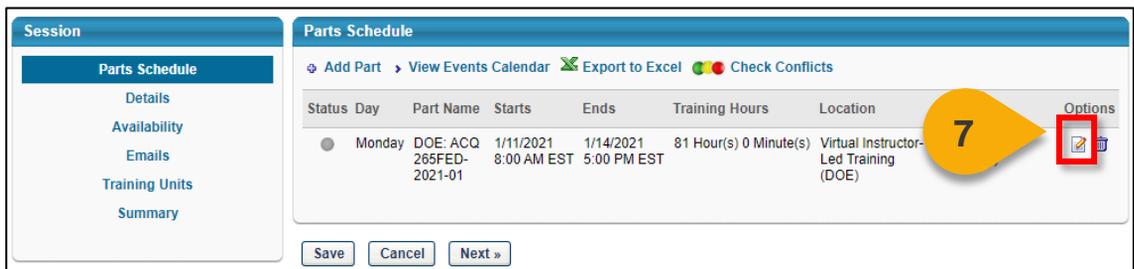
Subjects	Vendor	Language(s)	Tentative Sessions	Approved Sessions	Completed Sessions	Evaluation	Options
Federal	Federal - USAID PDT - Center for Continuous Learning	English (US)	0	2	0		
Federal	Federal - Homeland Security Acquisition Institute (HSAI)	English (US)	0	2	0		
Federal	Federal - DOE Acquisition Learning Center	English (US)	0	2	0		

Step 6: Click the **Edit icon** in the Options column to the right of the Session you would like to edit.



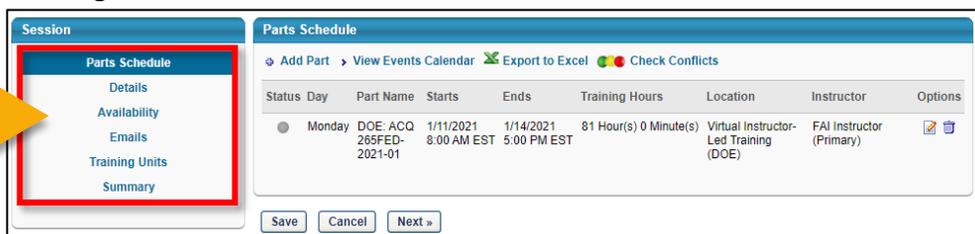
Day	Start Date	End Date	Session ID	Locator Number	Location	Enrollment	Evaluation	Status	Options
Monday	1/11/2021	1/14/2021	DOE: ACQ 265FED-2021-01	47866	Virtual Instructor-Led Training (DOE)	0 of 15			

Step 7: To edit the Part, click the **Edit icon** in the Options column.



Status	Day	Part Name	Starts	Ends	Training Hours	Location	Options
	Monday	DOE: ACQ 265FED-2021-01	1/11/2021 8:00 AM EST	1/14/2021 5:00 PM EST	81 Hour(s) 0 Minute(s)	Virtual Instructor-Led Training (DOE)	

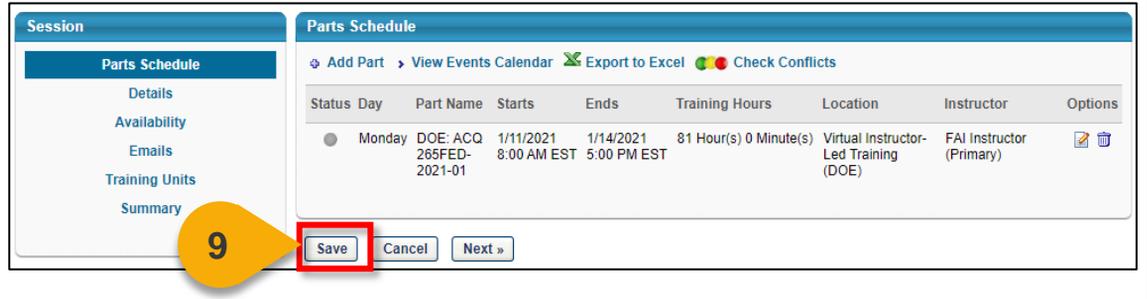
Step 8: To edit the details on any other tabs, click on the tab **Name** in the left-hand menu to navigate to that tab.



Status	Day	Part Name	Starts	Ends	Training Hours	Location	Instructor	Options
	Monday	DOE: ACQ 265FED-2021-01	1/11/2021 8:00 AM EST	1/14/2021 5:00 PM EST	81 Hour(s) 0 Minute(s)	Virtual Instructor-Led Training (DOE)	FAI Instructor (Primary)	

Edit Sessions (Cont. 2)

Step 9: Click **Save** to save any changes.



Session

Parts Schedule

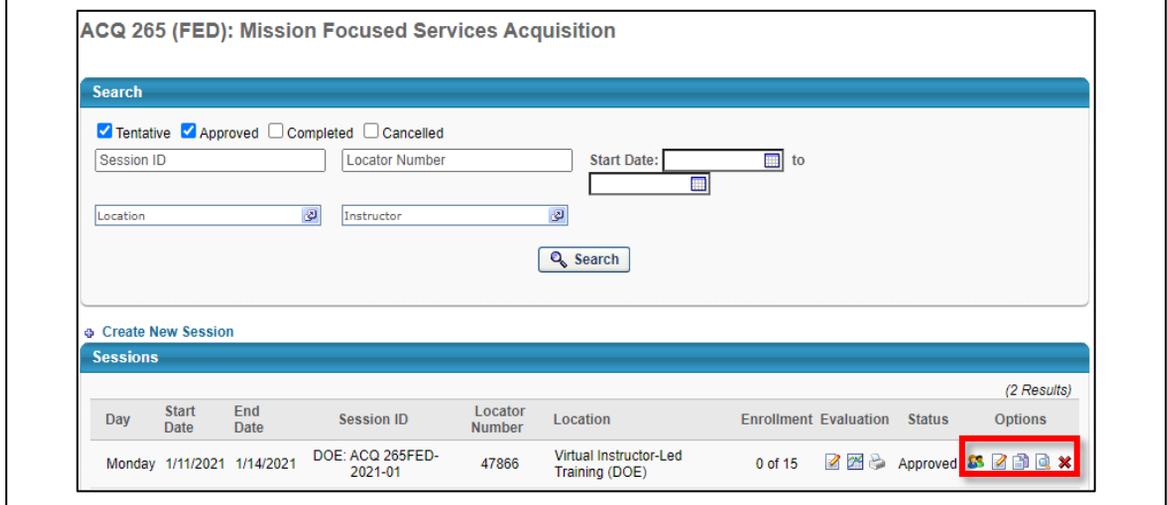
Details
Availability
Emails
Training Units
Summary

⚙ Add Part View Events Calendar 📄 Export to Excel 🚦 Check Conflicts

Status	Day	Part Name	Starts	Ends	Training Hours	Location	Instructor	Options
●	Monday	DOE: ACQ 265FED-2021-01	1/11/2021 8:00 AM EST	1/14/2021 5:00 PM EST	81 Hour(s) 0 Minute(s)	Virtual Instructor-Led Training (DOE)	FAI Instructor (Primary)	✎ 🗑

9 Save Cancel Next >

The Session is now available to Users. You will be returned to the Event page, where the Session is now listed. From here, you can **view the Roster**, **edit the Session**, **copy the Session**, or **cancel the Session**.



ACQ 265 (FED): Mission Focused Services Acquisition

Search

Tentative Approved Completed Cancelled

Session ID: Locator Number: Start Date: to

Location: Instructor:

⚙ Create New Session

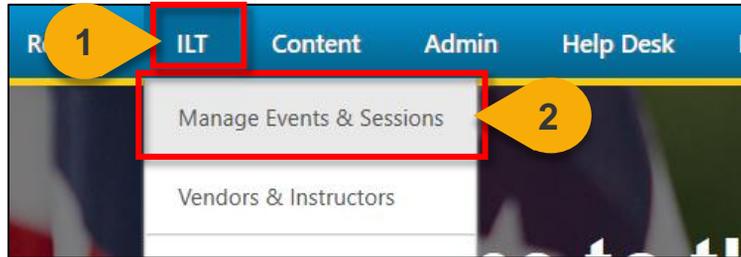
Sessions (2 Results)

Day	Start Date	End Date	Session ID	Locator Number	Location	Enrollment	Evaluation	Status	Options
Monday	1/11/2021	1/14/2021	DOE: ACQ 265FED-2021-01	47866	Virtual Instructor-Led Training (DOE)	0 of 15	📄 🗑	Approved	✎ 🗑 📄 🗑 ✖

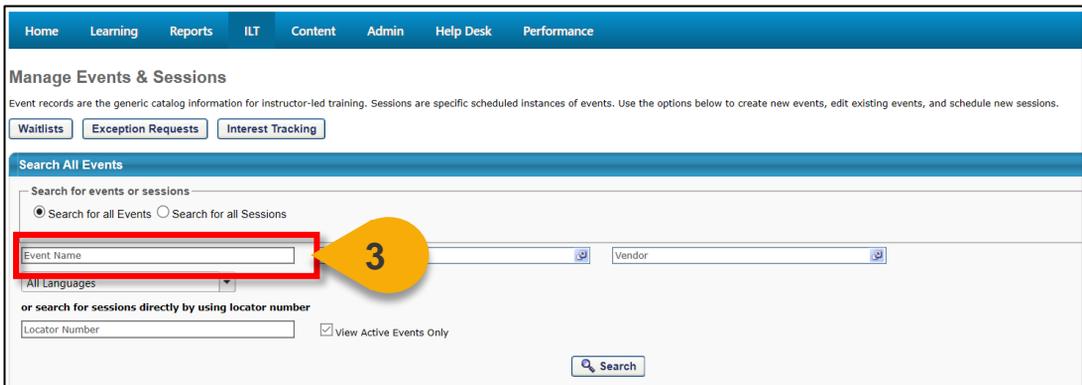
Cancel Sessions

When you want to cancel a Session...

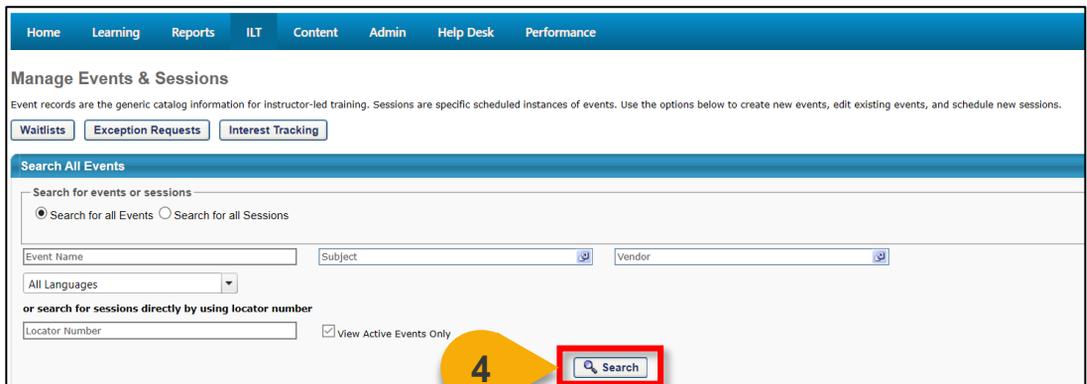
Steps 1 & 2: Hover over the **ILT** tab, then click on **Manage Events & Sessions**.



Step 3: Search for the Event to which the Session will belong. Enter the **Event Name** into the search field.



Step 4: Click **Search** or hit **Enter**.



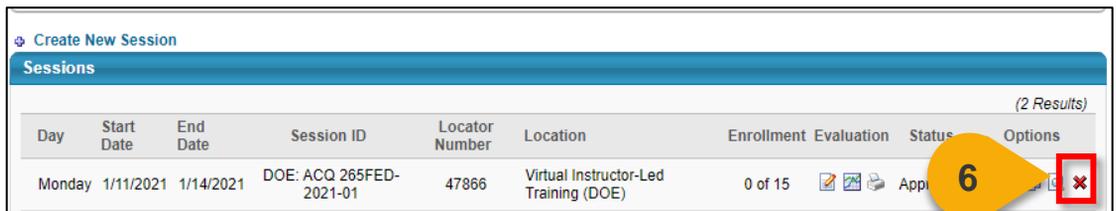
Cancel Sessions (Cont. 1)

Step 5: Select the **View Sessions** icon under the Options column to the right of the Event name.



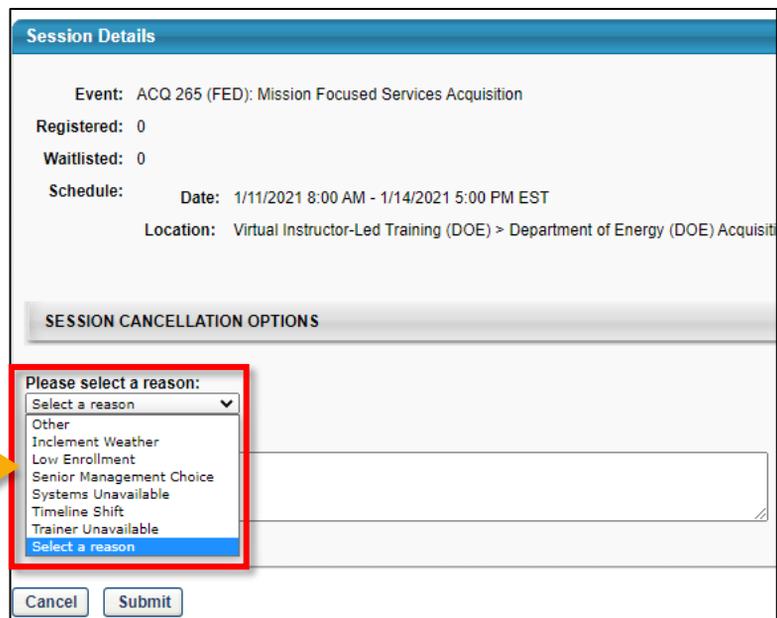
Subjects	Vendor	Language(s)	Tentative Sessions	Approved Sessions	Completed Sessions	Evaluation	Options
Federal	Federal - USAID PDT - Center for Continuous Learning	English (US)	0	2	0		
Federal	Federal - Homeland Security Acquisition Institute (HSAI)	English (US)	0	2	0		
Federal	Federal - DOE Acquisition Learning Center	English (US)	0	2	0		

Step 6: Click the **Cancel** icon in the Options column to the right of the Session you would like to cancel.



Day	Start Date	End Date	Session ID	Locator Number	Location	Enrollment	Evaluation	Status	Options
Monday	1/11/2021	1/14/2021	DOE: ACQ 265FED-2021-01	47866	Virtual Instructor-Led Training (DOE)	0 of 15			

Step 7: The Session Details page will show details about the Session and Session Cancellation Options. Choose a reason for cancelling the Session in the **Please Select a Reason** dropdown menu.



Session Details

Event: ACQ 265 (FED): Mission Focused Services Acquisition

Registered: 0

Waitlisted: 0

Schedule: Date: 1/11/2021 8:00 AM - 1/14/2021 5:00 PM EST

Location: Virtual Instructor-Led Training (DOE) > Department of Energy (DOE) Acquisition

SESSION CANCELLATION OPTIONS

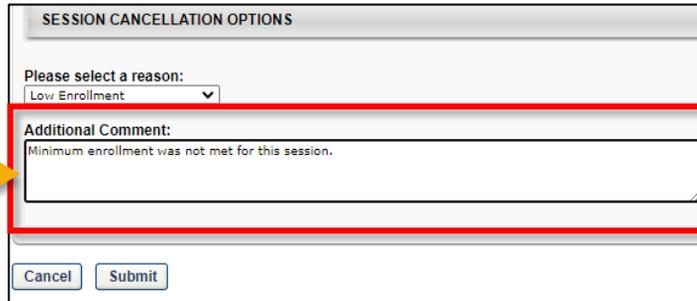
Please select a reason:

- Select a reason
- Other
- Inclement Weather
- Low Enrollment
- Senior Management Choice
- Systems Unavailable
- Timeline Shift
- Trainer Unavailable
- Select a reason

Cancel Submit

Cancel Sessions (Cont. 2)

Step 8: Enter a **comment** providing more detail about why the Session is being cancelled.



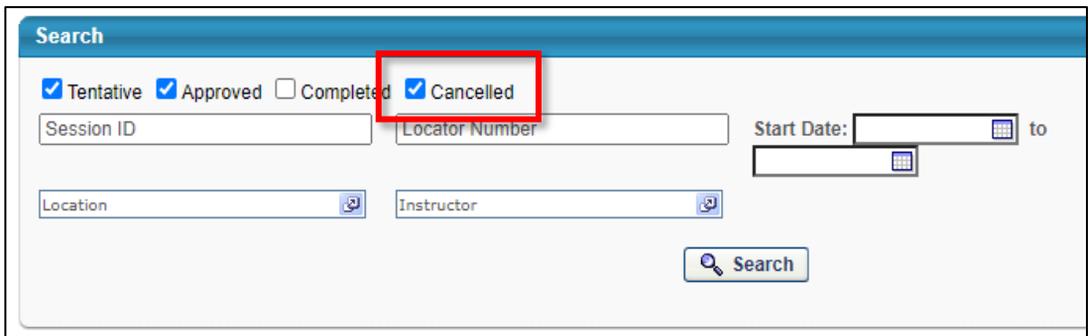
SESSION CANCELLATION OPTIONS

Please select a reason:
Low Enrollment

Additional Comment:
Minimum enrollment was not met for this session.

Cancel Submit

You will be returned to the Event page. If you need to view the Session you cancelled, toggle the **Cancelled** filter when searching for the Session.



Search

Tentative Approved Completed Cancelled

Session ID: _____ Locator Number: _____ Start Date: _____ to _____

Location: _____ Instructor: _____

Search

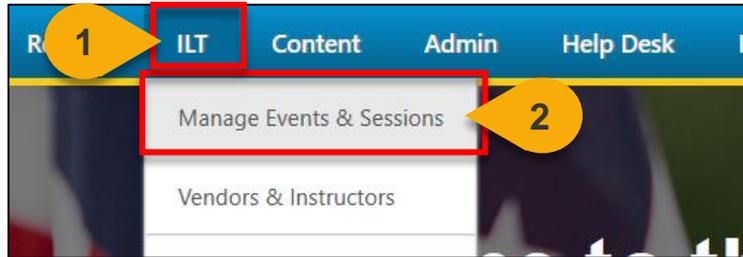
Roster & Waitlist Management



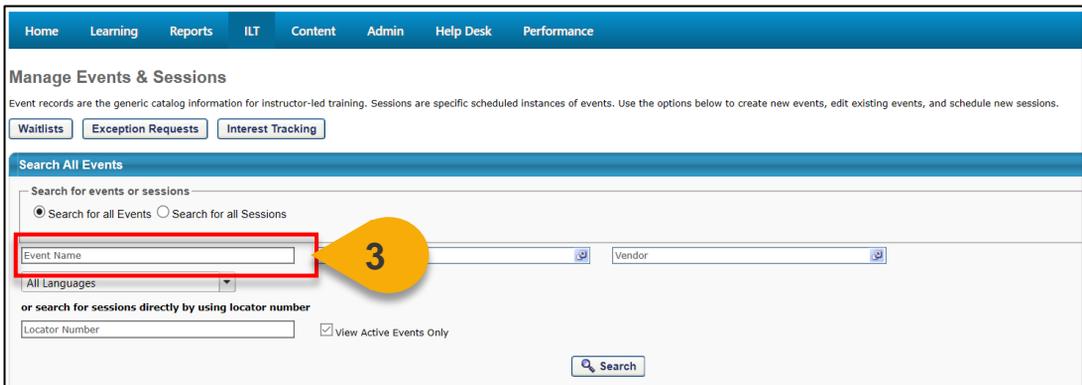
View Session Roster

When you want to view the Roster for an ILT...

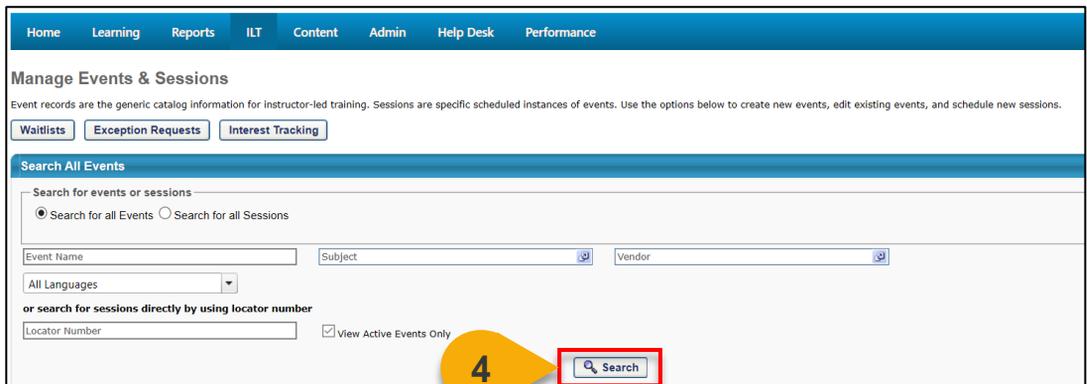
Steps 1 & 2: Hover over the **ILT** tab and click **Manage Events & Sessions**.



Step 3: Search for the Event to which the Session belongs. Enter the **Event name** into the search field.



Step 4: Click **Search** or hit **Enter**.



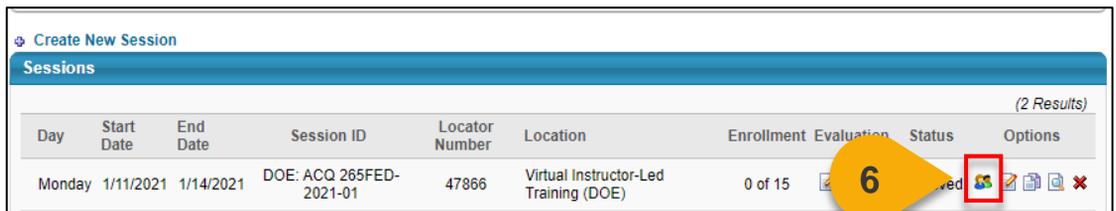
View Session Roster (Cont. 1)

Step 5: Select the **View Sessions** icon under the Options column to the right of the Event name.



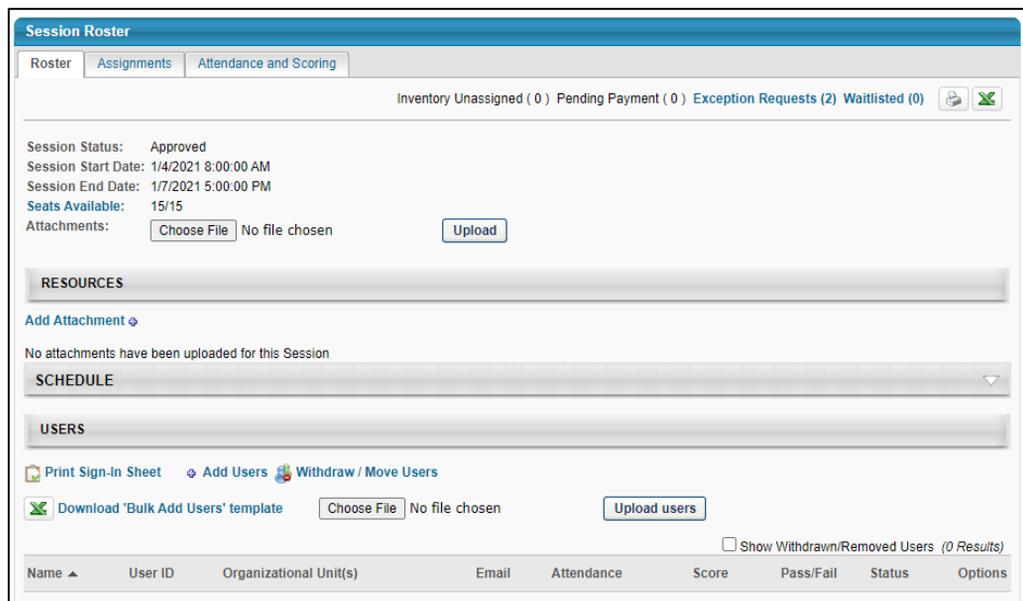
Subjects	Vendor	Language(s)	Tentative Sessions	Approved Sessions	Completed Sessions	Evaluation	Options
Federal	Federal - USAID PDT - Center for Continuous Learning	English (US)	0	2	0		
Federal	Federal - Homeland Security Acquisition Institute (HSAI)	English (US)	0	2	0		
Federal	Federal - DOE Acquisition Learning Center	English (US)	0	2	0		

Step 6: Click the **Roster** icon in the Options column to the right of the Session you would like to view.



Day	Start Date	End Date	Session ID	Locator Number	Location	Enrollment	Evaluation	Status	Options
Monday	1/11/2021	1/14/2021	DOE: ACQ 265FED-2021-01	47866	Virtual Instructor-Led Training (DOE)	0 of 15		Approved	

Step 7: From this page, you may view Users on the Roster and Waitlist. Additionally, you can manage enrollment and attendance.



Session Roster

Roster | Assignments | Attendance and Scoring

Inventory Unassigned (0) Pending Payment (0) Exception Requests (2) Waitlisted (0)

Session Status: Approved
Session Start Date: 1/4/2021 8:00:00 AM
Session End Date: 1/7/2021 5:00:00 PM
Seats Available: 15/15

Attachments: No file chosen

RESOURCES

Add Attachment

No attachments have been uploaded for this Session

SCHEDULE

USERS

No file chosen

Show Withdrawn/Removed Users (0 Results)

Name	User ID	Organizational Unit(s)	Email	Attendance	Score	Pass/Fail	Status	Options
------	---------	------------------------	-------	------------	-------	-----------	--------	---------

View Session Roster (Cont. 2)

Step 8: In the Users section of the Roster, you will see the Users who have been granted seats in the Session. Use the icons in the **Options** column to view the User's enrollment history or remove the User from the Roster.

USERS

[Print Sign-In Sheet](#) [Email Registered Users](#) [Add Users](#) [Withdraw / Move Users](#)

[Download 'Bulk Add Users' template](#) No file chosen

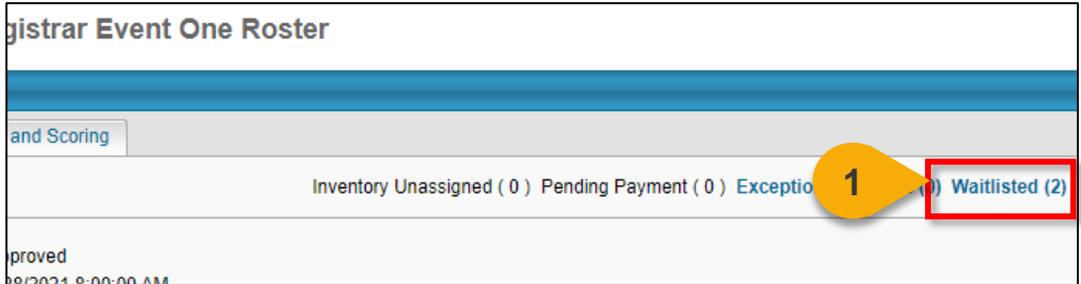
Show Withdrawn/Removed Users (2 Results)

Name ▲	User ID	Organizational Unit(s)	Email	Attendance	Score	Pass/Fail	Status	Options
		General Services Administration (Organization)		0 of 1 Parts Attended				
		General Services Administration (Organization)		0 of 1 Parts Attended			Registered	

Manage Waitlist

When you want to manage a waitlist for an ILT...

Step 1: Use the “View Session Roster” task aid to navigate to the Session Roster. Click the **Waitlisted** link in the top-right to view the Waitlist.



Step 2: The Waitlist will display. Edit Waitlist priority by changing the numbers in the **Order** column. The User with Order 1 will have first priority for an open spot in the course.

Order	Name	Organization Unit(s)	Original Request Date	Response Comments	Respond
<input type="text" value="1"/>		GENERAL SERVICES ADMINISTRATION (GSA) (Organization)	12/16/2020 2:00:43 PM	<input type="text"/>	<input type="radio"/> Grant <input type="radio"/> Deny
<input type="text" value="2"/>		General Services Administration (Organization)	12/16/2020 2:00:45 PM	<input type="text"/>	<input type="radio"/> Grant <input type="radio"/> Deny

Step 3: Click **Update Order** to save these changes.



Step 4: If you would like add a User to the Roster, select **Grant** in the Respond column. If you would like to remove a User from the Waitlist without granting them a spot in the course, select the **Deny** option in the Respond column.

Order	Name	Organization Unit(s)	Original Request Date	Response Comments	Respond
<input type="text" value="1"/>		GENERAL SERVICES ADMINISTRATION (GSA) (Organization)	12/16/2020 2:00:43 PM	<input type="text"/>	<input type="radio"/> Grant <input type="radio"/> Deny
<input type="text" value="2"/>		General Services Administration (Organization)	12/16/2020 2:00:45 PM	<input type="text"/>	<input type="radio"/> Grant <input type="radio"/> Deny

Manage Waitlist (Cont. 1)

Step 5: Click **Update Order and Process Responses** to save these changes.

2 General Services Administration (Organization)

u 5 Update Order and Process Responses Back

Update Roster via Upload

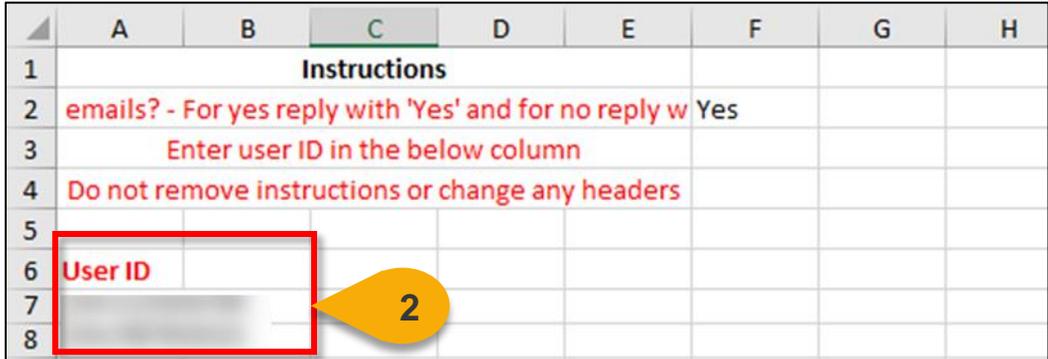
When you want to upload an updated Roster...

Step 1: Use the “View Session Roster” task aid to navigate to the Session Roster. Click on **Download ‘Bulk Add Users’ template**. A Microsoft Excel file will download.



The screenshot shows the 'SCHEDULE' and 'USERS' sections of the interface. Below these sections are several action buttons: 'Print Sign-In Sheet', 'Add Users', and 'Withdraw / Move Users'. The 'Download Bulk Add Users template' button is highlighted with a red rectangular box, and a yellow callout bubble with the number '1' points to it.

Step 2: In the file, enter the **User ID** of each User you want to add to the Roster into the spreadsheet and save the file. Alternatively, you can enter the **User’s email**.



	A	B	C	D	E	F	G	H	
1	Instructions								
2	emails? - For yes reply with 'Yes' and for no reply w						Yes		
3	Enter user ID in the below column								
4	Do not remove instructions or change any headers								
5									
6			User ID						
7									
8									

The screenshot shows an Excel spreadsheet template. The 'User ID' cell in row 6, column C is highlighted with a red rectangular box, and a yellow callout bubble with the number '2' points to it.

Step 3: Save the file to your computer. On the Roster page, click **Browse** and choose the Roster file you wish to upload.



The screenshot shows the same 'SCHEDULE' and 'USERS' sections as in Step 1. The 'Browse...' button is highlighted with a red rectangular box, and a yellow callout bubble with the number '3' points to it.

Update Roster via Upload (Cont. 1)

Step 4: Click Upload Users.

SCHEDULE

USERS

Print Sign-In Sheet Add Users Withdraw / Move Users

Download 'Bulk Add Users' template Upload users

Step 5: If there are sufficient seats on the Roster, Users will be added to the Roster.

USERS

Print Sign-In Sheet Email Registered Users Add Users Withdraw / Move Users

Download 'Bulk Add Users' template No file chosen

Show Withdrawn/Removed Users (2 Results)

Name	User ID	Organizational Unit(s)	Email	Attendance	Score	Pass/Fail	Status	Options
		General Services Administration (Organization)		0 of 1 Parts Attended			Registered	
		General Services Administration (Organization)		0 of 1 Parts Attended			Registered	

Step 6: If the Roster is full or if you are adding Users who fall outside the Enrollment Restrictions, a popup will appear with a warning message. You have the option to either **Increase the Session's available seats or **Add remaining Users to the waitlist**.**

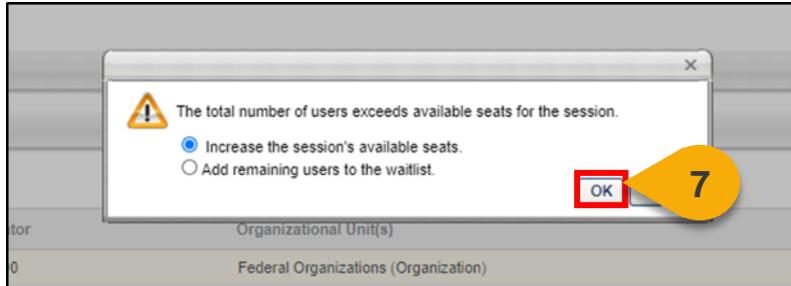
The total number of users exceeds available seats for the session.

Increase the session's available seats.

Add remaining users to the waitlist.

Update Roster via Upload (Cont. 2)

Step 7: After choosing your preferred option, select **OK**. Users will be added to the Roster and/or the Waitlist.



Upload Attendance

When you want to upload an attendance sheet to the Roster...

Step 1: Use the “View Session Roster” task aid to navigate to the Session Roster. Click on the **Attendance and Scoring** tab.

CON 124 (FED): Contract Execution Roster

Session Roster

Roster Attendance and Scoring 7

Session Status: Approved

Step 2: Click **Download Roster**. The file will download to your computer.

USERS

Check/Uncheck 2 Download Roster Browse... Upload Roster

(30 Results) 1 2 > >>

Step 3: In the Excel file you downloaded, update the **Score, Pass, and Part Attendance** columns for each User. **Save** the file.

Instructions to be followed for 'Bulk Update Attendance' Feature [Do not delete]

Do not update the headings of the column

Do not add or remove any record

Only score, Pass and Part Attendance column values can be updated

Pass and Part fields can only have the values as - 'Yes', 'No'

Name [Do	User ID [D	Score	Pass	Part1
		100	Yes	Yes
		100	Yes	Yes

3

Step 4: On the Roster page, click on **Browse**. Select the attendance sheet you would like to upload.

USERS

Check/Uncheck All Download Roster 4 Browse... Upload Roster

(30 Results) 1 2 > >>

Upload Attendance (Cont. 1)

Step 5: Click on **Upload Roster**. The attendance sheet will then be uploaded.

The screenshot shows a web interface for managing users. At the top, there is a header 'USERS'. Below it, there are several buttons: 'Check/Uncheck All', 'Download Roster', and 'Upload Roster'. The 'Upload Roster' button is highlighted with a red rectangular box. A yellow callout bubble with the number '5' points to this button. To the right of the 'Upload Roster' button, there is a text '(30 Results)' and a pagination control with numbers '1' and '2' and navigation arrows.

Step 6: The Attendance page will update. Click **Save** to save the updated attendance.

The screenshot shows a table with the following columns: Name, User ID, Attendance, Score, Pass, and Session Completion. There are two rows of data. The first row has a checked box in the Attendance column, a score of 100, a checked box in the Pass column, and a date of 1/28/2021. The second row has a checked box in the Attendance column, a score of 100, a checked box in the Pass column, and a date of 1/28/2021. Below the table, there is a 'Save' button highlighted with a red rectangular box. A yellow callout bubble with the number '6' points to this button.

Step 7: A popup will appear to notify you that the attendance is being updated and that the process will take about 15 minutes. Click **Ok**.

The screenshot shows a notification popup with the following text: 'corporate4proxy-stg.csod.com says Your attendance and scoring updates are now being processed. This process takes approximately 15 minutes or less to complete. Please remember to re-submit the roster if you would like to update the students' transcript statuses to reflect attendance and scoring changes. You do not need to wait for this process to complete before re-submitting the roster.' At the bottom right of the popup, there is an 'OK' button highlighted with a red rectangular box. A yellow callout bubble with the number '7' points to this button.

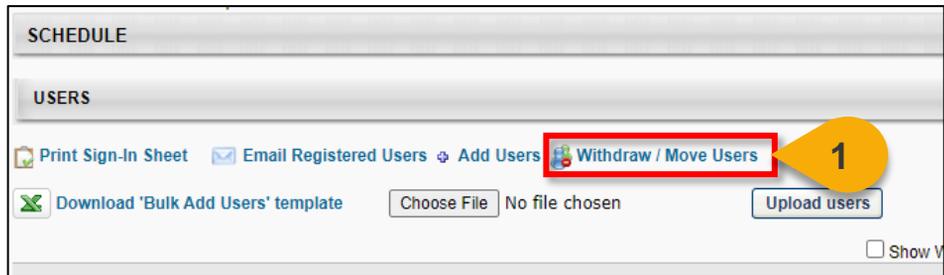
Step 8: The page will refresh and display the roster tab. Once the attendance processes in about 15 minutes, the list of Users will be updated with the completion status.

The screenshot shows the 'USERS' interface with the roster tab selected. The 'Status' column is highlighted with a red rectangular box. A dropdown menu titled 'Show Withdrawn/Removed Users' is open, showing a list of 'Completed' statuses. The 'Ok' button from the previous step is also visible in the background.

Move Users Between Sessions

When you want to move a User to another Session...

Step 1: Use the “View Session Roster” task aid to navigate to the Session Roster. In the Users panel, click the **Withdraw/Move Users** link.

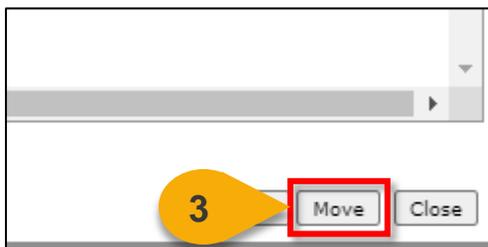


Step 2: In the Withdraw/Move Users window, click the **blue +** next to the Users you wish to move to different Session.

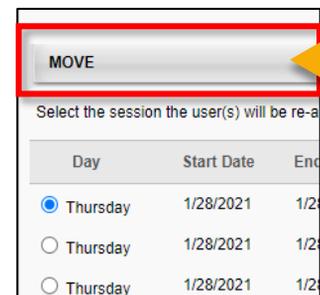
Search Results

Name	Org Unit
[Redacted]	General Services Administration (Lynne Schneider (Manager))
[Redacted]	General Services Administration (John Andre (Manager))

Step 3: After you have selected the desired Users, click **Move** at the bottom of the window.



Step 4: A new window will open. Scroll down to the **Move** section.



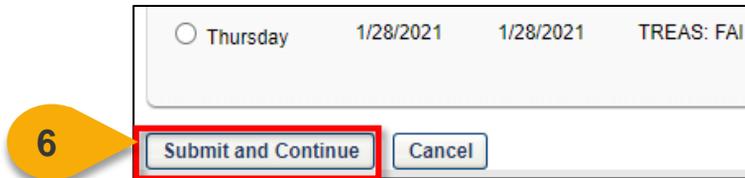
Step 5: Select the **Session** you would like to move the User(s) to.

Select the session the user(s) will be re-assigned to. (9 Results)

Day	Start Date	End Date	Session ID	Locator Number	Enrollment	Status
<input checked="" type="radio"/> Thursday	1/28/2021	1/28/2021	HHS: FAI 003-2021-001	47933	2 of 2	Approved
<input type="radio"/> Thursday	1/28/2021	1/28/2021	EPA: FAI 003-2021-001	47929	2 of 2	Approved
<input type="radio"/> Thursday	1/28/2021	1/28/2021	FAI: FAI 003-2021-001	47930	2 of 2	Approved

Move Users Between Sessions (Cont. 1)

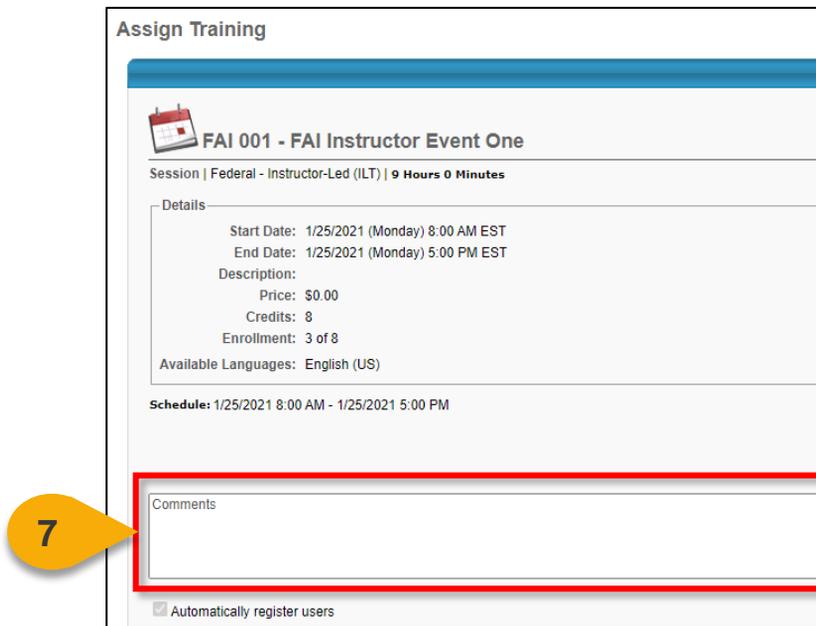
Step 6: Click **Submit and Continue**.



○ Thursday 1/28/2021 1/28/2021 TREAS: FAI

6 **Submit and Continue** Cancel

Step 7: You will then need to assign the new training to the User. Add any **comments** on the Assign Training screen.



Assign Training

 **FAI 001 - FAI Instructor Event One**

Session | Federal - Instructor-Led (ILT) | 9 Hours 0 Minutes

— Details —

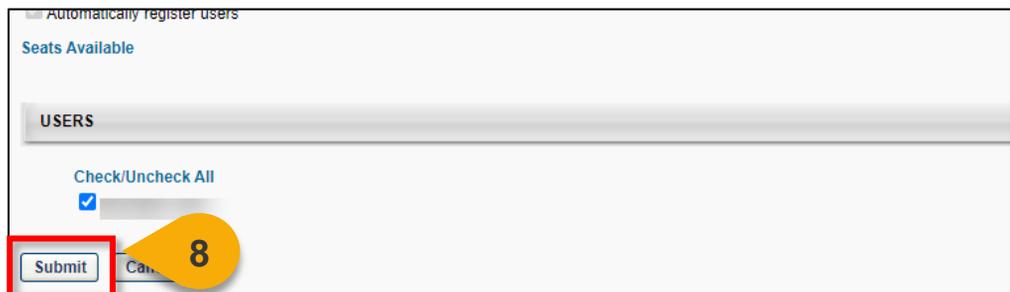
Start Date: 1/25/2021 (Monday) 8:00 AM EST
End Date: 1/25/2021 (Monday) 5:00 PM EST
Description:
Price: \$0.00
Credits: 8
Enrollment: 3 of 8
Available Languages: English (US)

Schedule: 1/25/2021 8:00 AM - 1/25/2021 5:00 PM

7 Comments

Automatically register users

Step 8: Click **Submit** to enroll the User in the new Session. The User will now appear on the new Roster.



Automatically register users

Seats Available

USERS

Check/Uncheck All

8 **Submit** Cancel

Send Emails from Roster

When you need to email students enrolled in a Session...

Step 1: Use the “View Session Roster” task aid to navigate to the Session Roster. From the Roster, click **Email Registered Users**.

The screenshot shows a web interface for a session roster. At the top, there is a link for 'Add Attachment'. Below that, a message states 'No attachments have been uploaded for this Session'. There are two main sections: 'SCHEDULE' and 'USERS'. Under the 'USERS' section, there are several buttons: 'Print S...', 'Email Registered Users' (highlighted with a red box and a yellow callout '1'), 'Add Users', and 'Withdraw / Move Users'. At the bottom, there is a 'Download 'Bulk Add Users' template' button, a 'Choose File' button with 'No file chosen' text, and an 'Upload users' button.

Step 2: Enter an **Email Title** to give a description of the nature of this email.

The screenshot shows the 'Add Email' form. It has a title 'Add Email' and a subtitle 'Use the fields below to create a new custom email or choose a preformatted template'. Below that, it says 'Create e-mails using the fields below. Click here for help.' There is a warning icon and a note: 'Note: Files uploaded through the Image or Document Manager will be stored...'. The form has a table with one row: 'Action Send Email Event'. Below the table are three input fields: 'Email Title' (with 'New e-mail' entered, highlighted by a red box and a yellow callout '2'), 'From Address', and 'Reply-To Address'.

Step 3: Enter a **From Address**.

This screenshot is a close-up of the 'Add Email' form, focusing on the 'From Address' field. The 'Email Title' field contains 'New e-mail'. The 'From Address' field is highlighted with a red box and a yellow callout '3'. The 'Reply-To Address' field is empty.

Step 4: Enter a **Reply-To Address** for recipients to respond.

This screenshot is a close-up of the 'Add Email' form, focusing on the 'Reply-To Address' field. The 'Email Title' field contains 'New e-mail'. The 'From Address' field is empty. The 'Reply-To Address' field is highlighted with a red box and a yellow callout '4'.

Send Emails from Roster (Cont. 1)

Step 5: Click **Display a list of tags that can be used within the subject** to show a list of available tags you can use in the Subject and Body of the email. If you decide to use tags, we recommend copying the tag directly from the menu and pasting it into the subject or body of the email.

Tags are replaced with the corresponding values when emails are sent.

5 **Tags** Display a list of tags that can be used within the subject

Subject

Deep Link Base URL Page URL
Default Select

Step 6: Input the subject of your email into the **Subject** field.

Tags are replaced with the corresponding values when emails are sent.

6 **Tags** Display a list of tags that can be used within the subject

Subject

Deep Link Base URL Page URL
Default Select

Step 7: Use the **Deep Link** dropdown options to select a link to a page in CSOD.

Tags are replaced with the corresponding values when emails are sent.

7 **Tags** Display a list of tags that can be used within the subject

Subject

Deep Link Base URL Page URL
Default Select

Step 8: Write the body of the email into the **Message** field. You can choose to send the email as Plain Text or in HTML.

Message HTML Plain Text

Verdana 10pt Normal Zoom

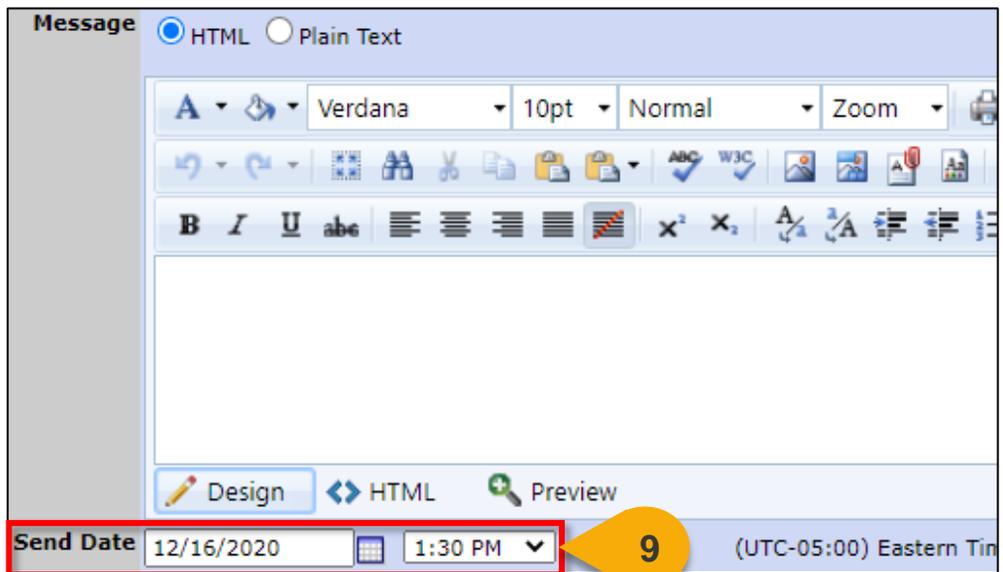
8

Design HTML Preview

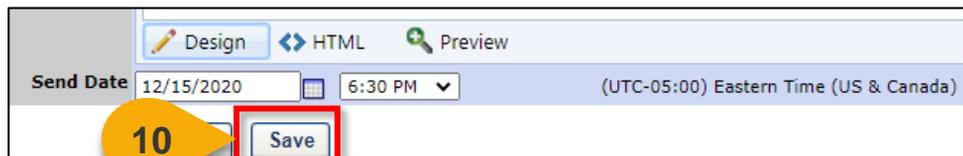
Send Date 12/16/2020 1:30 PM (UTC-05:00) Eastern Time

Send Emails from Roster (Cont. 2)

Step 9: Select a **Send Date**. This is the date and time at which the email will send.



Step 10: Click **Save** to send the email on the Send Date you selected..



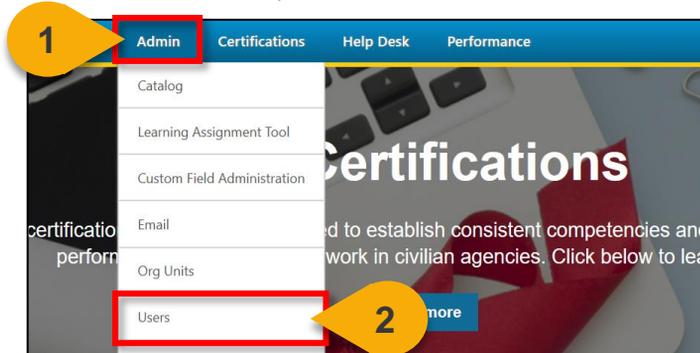
User Information



Search for a User

When you want to look up a User...

Steps 1 & 2: Hover over the **Admin** tab, then click **Users**.



Step 3: Enter User information into the **search fields**.

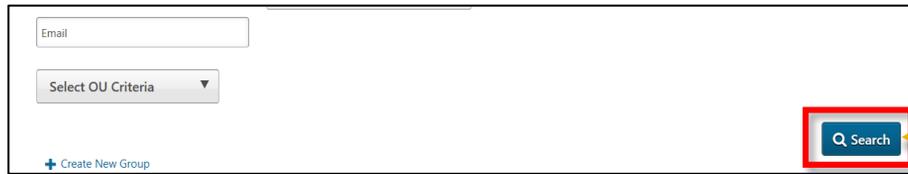
A screenshot of the 'Users' search form. The form contains several input fields: 'Last Name', 'City', 'Manager' (with a pop-out icon), 'First Name', 'State', 'Approver' (with a pop-out icon), 'User ID', 'Zip', 'Active' (dropdown menu), 'User Name', 'Country' (dropdown menu), and 'Email'. A 'Select OU Criteria' dropdown menu is located at the bottom. A red box highlights the search fields, and a yellow callout bubble with the number '3' points to the 'Approver' field.

Step 4: Click on **Select OU Criteria** to further filter your search if desired. A **dropdown menu** will appear and allow you to select the OU type. The pop-out icon will then appear and allow you to select the OU.

A screenshot of the 'Users' search form, identical to the previous one. A red box highlights the 'Select OU Criteria' dropdown menu at the bottom, and a yellow callout bubble with the number '4' points to it.

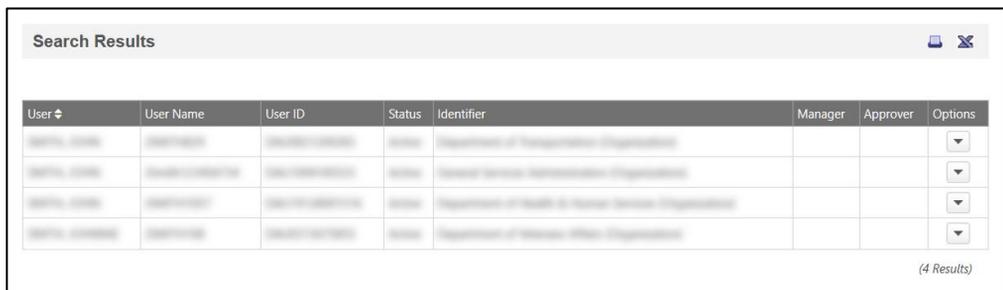
Search for a User (Cont. 1)

Step 5: Hit Enter or click Search.



The screenshot shows a search interface with an "Email" input field, a "Select OU Criteria" dropdown menu, and a "+ Create New Group" link. A red box highlights the "Search" button, which is a blue button with a magnifying glass icon and the text "Search". A yellow callout bubble with the number "5" points to the search button.

The search results will populate. From here, you can view the Transcript for the User. See the "View User's Transcript" task aid for more information on how to perform this function.



The screenshot shows a "Search Results" window with a table of results. The table has columns for User, User Name, User ID, Status, Identifier, Manager, Approver, and Options. There are 4 rows of results, each with a dropdown arrow in the Options column. Below the table, it says "(4 Results)".

User	User Name	User ID	Status	Identifier	Manager	Approver	Options
[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]			▼
[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]			▼
[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]			▼
[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]			▼

(4 Results)

View User's Transcript

When you want to view a Transcript...

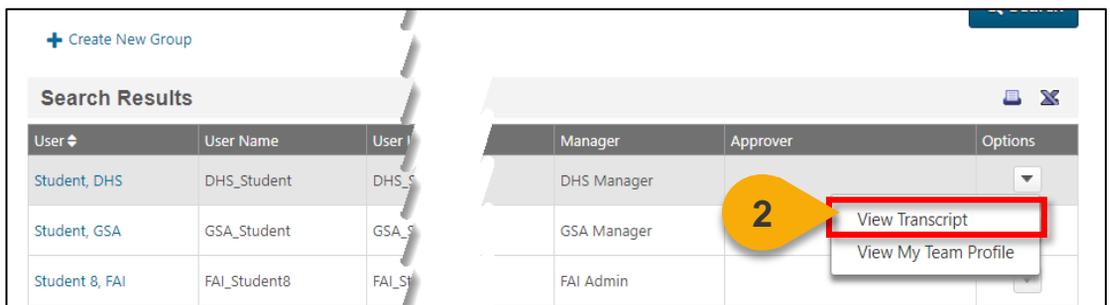
Step 1: Use the "Search for a User" task aid to find the User Record you wish to view. Click the **dropdown arrow** in the **Options** column.



The screenshot shows a table with search results. The table has columns: User, User Name, User ID, Manager, Approver, and Options. The first row is for a user named 'Student, DHS' with User Name 'DHS_Student' and User ID 'DHS_S...'. The Options column for this row has a dropdown arrow highlighted with a red box and a yellow callout bubble containing the number '1'.

User	User Name	User ID	Manager	Approver	Options
Student, DHS	DHS_Student	DHS_S...	DHS Manager		View Transcript
Student, GSA	GSA_Student	GSA_S...	GSA Manager		

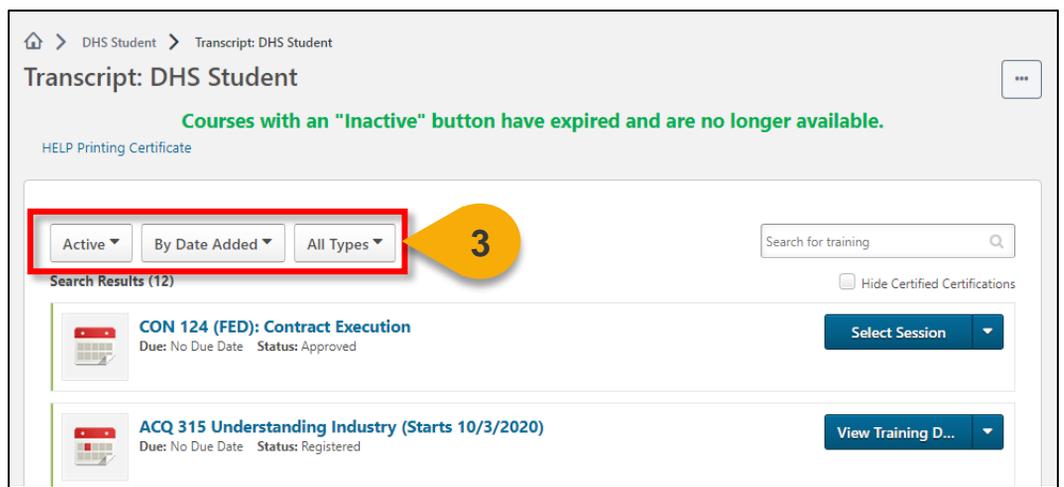
Step 2: In the dropdown menu, select **View Transcript**.



The screenshot shows the same table as in Step 1. The dropdown menu for the 'Options' column is open, showing two options: 'View Transcript' and 'View My Team Profile'. The 'View Transcript' option is highlighted with a red box and a yellow callout bubble containing the number '2'.

User	User Name	User ID	Manager	Approver	Options
Student, DHS	DHS_Student	DHS_S...	DHS Manager		View Transcript View My Team Profile
Student, GSA	GSA_Student	GSA_S...	GSA Manager		
Student 8, FAI	FAI_Student8	FAI_ST...	FAI Admin		

Step 3: You will now see the **User's Transcript**. You can use the **filters** on this page to view items with a specific status or of a specific type. You can also change how your results are ordered. The default is set to order By Date Added.



The screenshot shows the transcript page for 'DHS Student'. The page title is 'Transcript: DHS Student'. Below the title, there is a green message: 'Courses with an "Inactive" button have expired and are no longer available.' Below this message, there are three filter buttons: 'Active', 'By Date Added', and 'All Types'. These three buttons are highlighted with a red box and a yellow callout bubble containing the number '3'. To the right of the filters is a search box labeled 'Search for training' and a 'Hide Certified Certifications' checkbox. Below the filters, there are two course entries: 'CON 124 (FED): Contract Execution' and 'ACQ 315 Understanding Industry (Starts 10/3/2020)'. Each entry has a 'Select Session' or 'View Training D...' button.

Transcript: DHS Student

Courses with an "Inactive" button have expired and are no longer available.

HELP Printing Certificate

Active By Date Added All Types

Search Results (12)

CON 124 (FED): Contract Execution
Due: No Due Date Status: Approved

ACQ 315 Understanding Industry (Starts 10/3/2020)
Due: No Due Date Status: Registered

Reports

Standard Reports Available to Registrars:

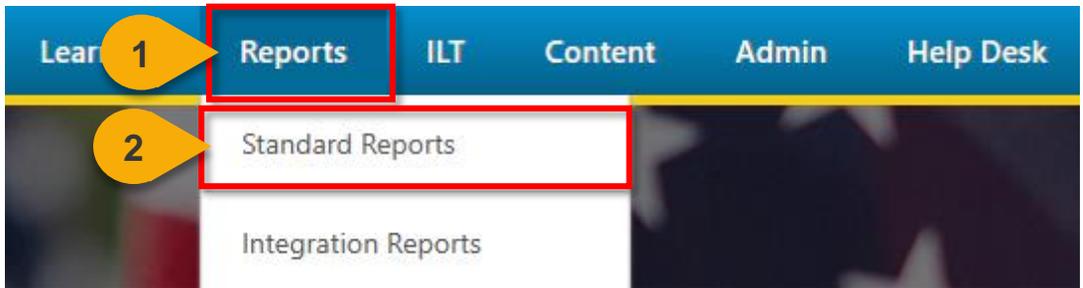
- ILT Enrollment Summary Report
- ILT No Show Report
- Instructor Calendar Report
- Required/Suggested Training Report
- Transcript Status Report
- ILT Interest Tracking Report
- ILT Session Withdrawal Report
- Training Evaluation Report



View Standard Reports

When you want to view Standard Reports...

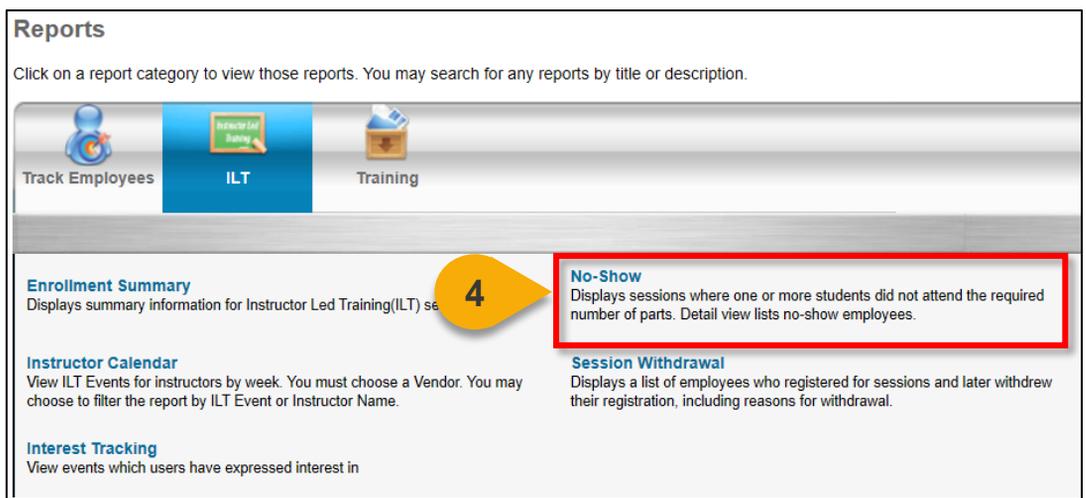
Steps 1 & 2: Hover over the **Reports** tab, then click **Standard Reports**.



Step 3: Choose the **Report Category**. The Report Categories available will vary depending on your roles.



Step 4: Select the type of report you would like to view by clicking on the **name of the report**. The reports available to you will vary depending on your roles. See the previous page of this task aid for the minimum reports you should see for this role.



View Standard Reports (Cont. 1)

Step 5: Enter data into the **filters** you would like to apply to the report. The filters available will vary depending on the report selected. The system will alert you if you try to run a Standard Report with required fields missing. Visit https://help.csod.com/help/csod_0/Content/Reporting/Standard_Reports/Standard_Reports_Overview.htm?Highlight=standard%20report for more information on specific standard reports.

Enrollment Summary
View summary information for Instructor Led Training (ILT) sessions.

Date Filters

Date Criteria: Select ▼ From: 12/1/2020 To: 12/28/2020

Advanced Filters

Facility :

Vendor : All

Instructor : (Please Select Vendor First)

Event :

Locator Number :

Printable Version Export to Excel Export to Text

Step 6: Select the option you would like for the export: **Printable Version**, **Export to Excel**, or **Export to Text** (when available). The file will download to your computer.

Advanced Filters

Facility :

Vendor : All

Instructor : (Please Select Vendor First)

Event :

Locator Number :

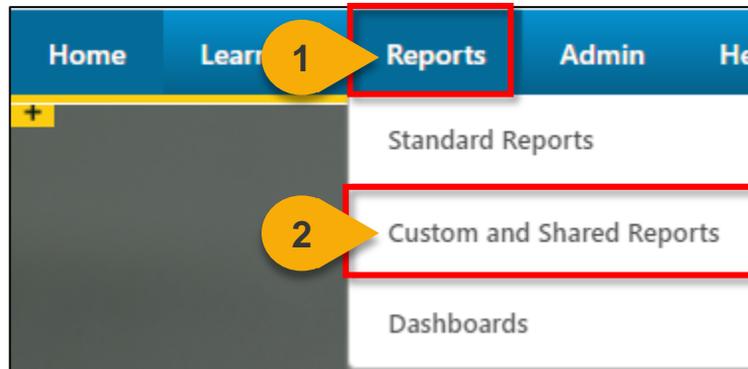
Printable Version Export to Excel Export to Text

Note: You may receive an error message when trying to open the spreadsheet. If this happens, click “Yes” to open the file.

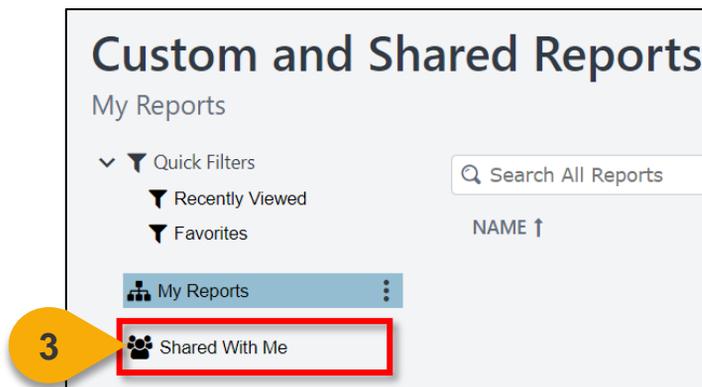
View and Download Custom Reports

When you want to filter and download a report...

Steps 1 & 2: Hover over the **Reports** tab, then click **Custom and Shared Reports**.



Step 3: On the left-hand side of the screen, click **Shared With Me** to see reports that have been shared with you.

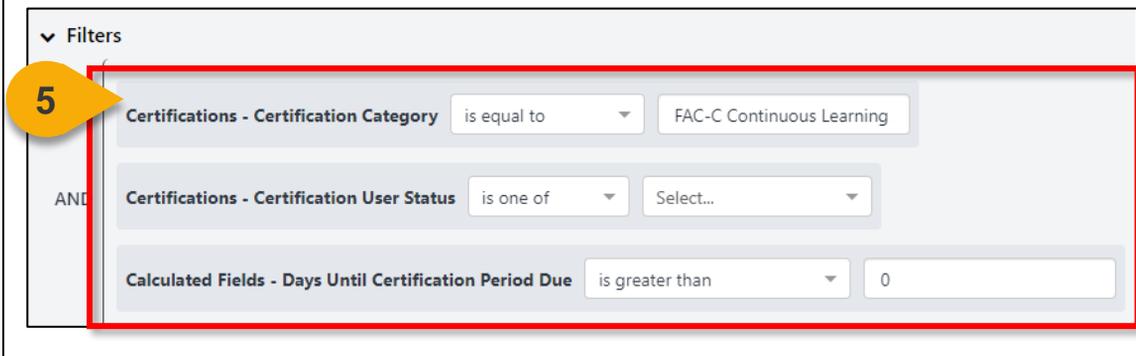


Step 4: Click the **Report Name** you would like to view to update the report filters.

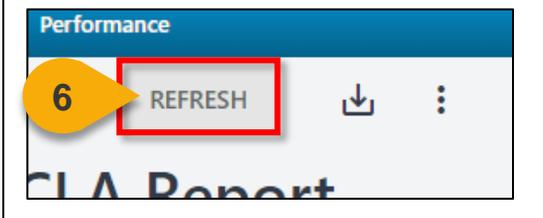


View and Download Custom Reports (Cont. 1)

Step 5: Update the **filters** as needed. The filters will vary based on the report.



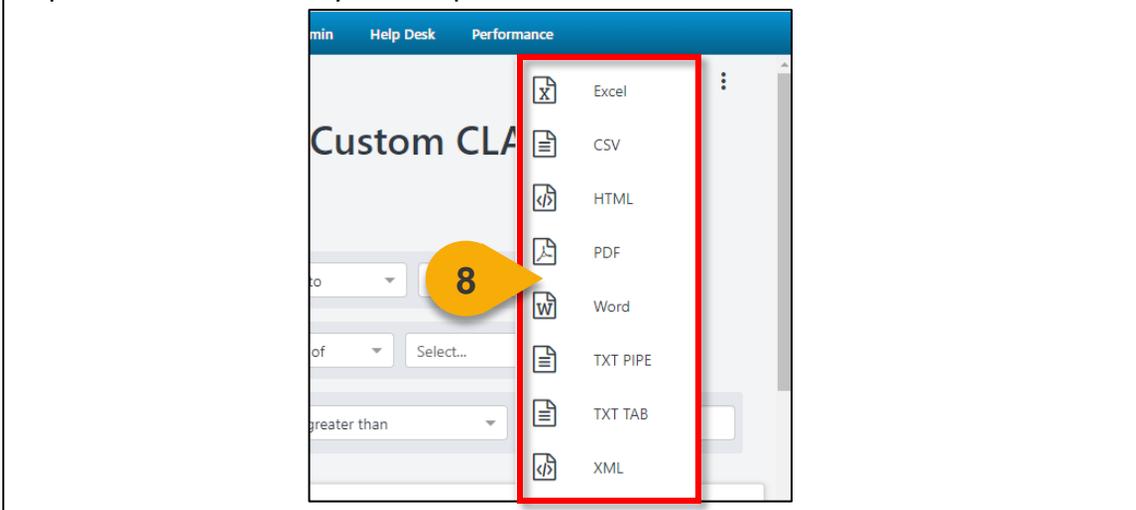
Step 6: Click **Refresh** in the top right corner to see a sample of the newly-filtered report, which will appear on the bottom portion of the page.



Step 7: Click the **Download Options** icon in the top right corner to see the formats available for this report.



Step 8: Choose the **File Format** in which you would like to download the report. The report will download to your computer.



Additional Resources



Additional Resources

Support Area	Support Provided	Contact
Defense Acquisition University (DAU) Help Desk	<ul style="list-style-type: none"> FAI CSOD System Questions and Issues FAI CSOD System Errors and Troubleshooting Password Issues and Resets 	Email: DAUHelp@dau.edu Phone: (703) 805-3459, X1
Your Agency's Acquisition Career Manager (ACM)	<ul style="list-style-type: none"> Agency-specific Acquisition Training, Certification, and Continuous Learning (CL) Requirements Agency-specific Acquisition Policies and Procedures Career Development Training and Development Opportunities 	https://www.fai.gov/humancapital/acquisition-career-manager-acm
FAI CSOD Training Materials and Online Resources	<ul style="list-style-type: none"> Task Aids for FAI CSOD Roles FAI CSOD Training Videos Other Guidance for Performing Tasks in FAI CSOD 	https://dau.csod.com/catalog/CustomPage.aspx?id=221000511 https://dau.csod.com/catalog/CustomPage.aspx?id=221000509
FAI Website FAQs	<ul style="list-style-type: none"> FAI CSOD Migration Acquisition Training Federal Acquisition Certifications (FAC-C, FAC-COR, FAC-P/PM) More! 	https://www.fai.gov/page/migration-faitas-fai-cornerstone-ondemand-csod-faqs
FAI Staff	All other questions	faicsod@gsa.gov